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ABSTRACT

An independent, external evaluation of the compensatory component of the Educational Opportunities Fund of Alberta, Canada covered the period from July 1973 to June 1976 and focused on twenty-one northern Alberta school districts. Results revealed that pupil mastery of basic skills has improved and pupil selfconfidence has increased since the implementation of the program. In addition, pupils have more positive attitudes toward their schooling and teachers have enlarged their stock of teaching skills and techniques. (Author/MV)

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EVALUATION REPORT
OF THE
EDUCATIONAL OPPORTUNITIES FUND
(COMPENSATORY COMPONENT)

A STUDY COMMISSIONED BY THE
MINISTER OF EDUCATION OF ALBERTA

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June 30, 1976

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*Project Supervisors include Curriculum Development Coordinators, Program Development Officers, Supervisors of Instruction, and Project Contact Persons (Principals, Teachers and others with this designated responsibility).

REPORT FORMAT

The report is organized into nine sections. Section I -- "Executive Summary" -- is a synopsis of the evaluation finding, conclusions and recommendation. Section II -- "Fiscal Data" -- presents a summary of the jurisdictions participating in compensatory education and the funds appropriated for projects in those districts. Section III -- "Historical Sketch of the Development of EOF (Compensatory) Policy Guidelines" -- contains an overview of major problems encountered by the Department in attempting to define the target population for compensatory funds. Section IV -- "A Description of EOF (Compensatory) Policy Guidelines" -- is a capsule description of the information contained in the Policy Manual, 1974. Section V -- "The Merit of EOF (Compensatory) Policy Guidelines: A Report of Data Based on Interviews Held in All Participating Districts" -- is a detailed presentation of opinions expressed by project personnel at twenty-one project sites. Section VI -- "The Merit of EOF (Compensatory) Policy Guidelines: A Report of Data Based On Mail Questionnaires and Telephone Interviews" -- presents the findings resulting from a survey of all superintendents, deputy and assistant superintendents, project supervisors and school board chairmen in participating jurisdictions. Section VII -- "The Merit of EOF (Compensatory) Policy Guidelines: A Survey of Non-Participating Districts" -- provides a summary of the opinions of persons unsuccessful in attempts to gain approval for projects and the opinions of school superintendents in other non-participating jurisdictions. Section VIII -- "Program Results: A Survey of All Jurisdictions Operating Projects" -- is a report of the opinions of project personnel about the benefits of EOF (Compensatory). Section IX -- "Program Results: A Report of Data Based on Project Evaluation Reports" -- is a summary of the benefits of EOF (Compensatory) reported by project evaluators in evaluation reports submitted to the Department.

Persons with limited reading time are advised to begin with Section I -- "Executive Summary." This section has been removed from the amplified version and bound separately to allow for wider dissemination of the major findings, conclusions and recommendations. The amplified version of the report contains a detailed presentation of the findings resulting from personal interviews, mail questionnaires, telephone interviews, and the analysis of project evaluation reports. Limited quantities of the amplified version have been printed. Copies are available from the Department upon request. A copy of the Technical Report has been filed with the Planning and Research Branch. The Technical Report will be of special interest to educational evaluators and others desiring complete descriptive and technical information about the conceptual framework and evaluation methodology. This document is available from Alberta Evaluation Research Associates Ltd. on a loan basis.

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Although the study team was in frequent contact with the Steering Committee and other members of the Department of Education, all observations, conclusions and recommendations expressed in this report are those of its authors.

SECTION I

EVALUATION OF THE EDUCATIONAL OPPORTUNITIES FUND (COMPENSATORY COMPONENT)

AN EXECUTIVE SUMMARY

INTRODUCTION

In Alberta, as in several other Canadian provinces, the provision of special educational opportunities for the physically, emotionally and mentally handicapped child has become a well established and commonly accepted practice. Recently another type of learning disability, which is induced by environmental factors, has emerged as a concern of prime importance. In several countries of the world, including Canada, educational programs have been introduced which are designed to provide extra instructional assistance for children from deprived milieu. Programs of this nature have been termed "compensatory."[1] Compensatory education has been defined in Alberta as "any program administered by a school authority designed to compensate for social, economic and cultural deprivation in order that the pupils concerned may receive maximum benefit from the regular program opportunities of the school."[2]

President John Fisher of Columbia University is credited with coining the term "compensatory education."[3] In its broadest sense, compensatory education is a unique American phenomenon referring to the nation-wide social intervention programs which emerged during the mid-sixties in response to urgent social needs in the United States. Massive federal support for education came in the wake of the burgeoning demand of minority groups for equality of educational opportunity, the increased value being placed on education by society at large, and the growing concern that the educational system was not adequately educating the children of the nation.[4] Funds were provided for special health, welfare, and educational programs for the poor and minority groups. Compensatory education was proclaimed by some as a panacea for the social ills of American society as it was assumed that compensatory education would be instrumental in breaking the cycle of poverty which had bound these people for several generations. School practices in compensatory education stressed remediation in the basic skills areas of reading, language and mathematics. By Federal statute (Elementary and Secondary Education Act of 1965), Title I funds were made available to local school districts for the purpose of providing instructional programs and related services to meet the special needs of disadvantaged children. Such funds were to be used to supplement and extend the services already being provided by the local school system and could not be used in any way to supplant state and local funds already available; that is, the Title I effort had to be an addition to the existing state and local effort. The purpose of Title I was to raise the academic achievement of seriously educationally disadvantaged pupils in eligible school attendance areas having a high incidence of poverty, through the application of supplementary funds over and above those provided from state and local sources.[5] A great debate has taken place concerning the value of compensatory education as an educational program in the United States.

Efforts to undertake programs of remediation for disadvantaged children in Alberta are frequently undermined by the argument that compensatory education endeavours in the United States have failed and that, therefore, similar undertakings in Canada would be unwise. It was for this reason that the Government of Alberta decided to place a heavy emphasis on evaluation to guide the introduction of compensatory education into this province. The policy of the government was to proceed slowly and to keep the funding level low until sufficient evidence was available on which to decide whether or not the program was beneficial.[6] At a conference in March, 1974 the then Minister of Education, Louis Hyndman, responded to a concern that the fund might terminate after the initial three year period by saying, "I think that's a fair concern and it's best that I reassure everybody that if the program can be evaluated as being good, then the money will continue to be made available, possibly or probably within general school program funding."[7] A similar position was taken by the present Minister of Education, Julian Koziak, when he announced the continuation of EOF beyond June 30, 1976. "Funding of compensatory programs (remedial instruction in areas such as Math and English) will continue on a project approval basis, with approval related to evaluations of the benefits of such programs to the students."[8]

During the three year period from 1973 to 1976, the Province of Alberta ventured into compensatory education in a relatively small way compared to the immense undertakings underway in many of the American states. Approximately one and a half million dollars was appropriated annually for project planning, implementation and evaluation at twenty-one sites in the province. This low funding level could be construed to mean that little need exists in Alberta for programs of a compensatory nature but, according to the Worth Report, this is not so.[9] It was the policy of the Government of Alberta to move cautiously into compensatory education to avoid a mistake similar to the one exemplified by the American experience with Project Head Start. This program was first designed as a small-scale experiment. As it had much popular appeal during the early stages of implementation, it expanded to a national program costing millions of dollars before any attempt was made to test, evaluate or thoroughly establish a rationale for it. The expansion of the program to satisfy political and public pressure before its rationale and its structure had been pre-tested, foredoomed it to failure.[10]

When compensatory education was first introduced in this province in 1973, vast sums of money could have been provided for large scale efforts, but the government chose not to do this. Instead, it decided to invest only a small amount to provide a base for research in order to discover the best ways to invest possible larger amounts at some future time. It was the policy of the government to study all aspects of this initial small thrust very thoroughly in order to learn all that could be learned, and then to determine future directions for compensatory education in Alberta.

II PURPOSE OF THIS REPORT

This report has been prepared in compliance with an agreement dated July 24, 1975 between the Minister of Education of the Province of Alberta and Alberta Evaluation Research Associates Ltd. of Calgary. The company was commissioned to conduct an independent external evaluation of the compensatory component of the Educational Opportunities Fund during the contract period September 1, 1975 to June 30, 1976.

III THE OBJECTS OF THE STUDY

In general, the purpose of the study was to ascertain the merit of the compensatory component of the Educational Opportunities Fund.

The evaluation was guided by eight general questions which corresponded to four program components which served as the primary points of focus for the study. Evaluation studies usually address questions about outcomes. While this focus is an important one, it is not the only one. Evaluation studies should also address questions about the merit of the goals, of the designs for achieving the goals, and of efforts to implement the designs. The focus on these four program components generated eight specific questions which served to guide the study:

1. Goals:

    (a) What is the merit of the objective that was chosen for the compensatory component of EOF?

    (b) What modifications might result in improvements in the objective?

2. Designs:

    (a) What is the merit of the policy guidelines which were developed by the Department of Education to enable local school personnel to plan and implement projects of a compensatory nature?

    (b) What modifications in the guidelines might result in improvements?

3. Implementation:

    (a) What were the strengths and weaknesses of the policy guidelines under operating conditions?

(b) What modifications in implementation procedures might improve the guidelines under operating conditions?

4. Results:

(a) What outcomes did the EOF (Compensatory) program produce?

(b) Are the outcomes of sufficient merit to warrant continuing the program in the future?

IV ORGANIZATION OF THE REPORT

The report has been prepared in three volumes to attempt to meet the reading interests and needs of several different audiences. The first volume, an executive summary, was prepared for individuals interested in a brief overview of the methods of the study, its findings and conclusions and recommendations. Volume two is an amplified version of the executive summary. This volume contains a comprehensive presentation of the findings resulting from personal interviews, telephone interviews, mail questionnaires and reviews of project evaluation reports. This volume is available on a loan basis from the Regional Offices of Education.

The final volume, volume three, will be of special interest to education evaluators and others desiring more complete descriptive and technical information. A copy of volume three has been filed with the Director of the Planning and Research Branch of Alberta Education. Limited copies of this volume are available from Alberta Evaluation Research Associates Ltd. on a loan basis.

V AN OVERVIEW OF THE EVALUATION PLAN

The prime areas of concern in the evaluation were the program goals, designs, implementation and results. An evaluation plan was developed to ascertain the merit of each of these program components and to recommend changes for improvement in the future.

1.0 Preparation of A Historical Sketch of the Development of EOF (Compensatory) Policy Guidelines.

During the early implementation of EOF (Compensatory), the program went through considerable change and revision. Documents collected from the EOF files were reviewed in order to collect evidence about past experiences which would perhaps contribute to a greater understanding of the present situation. A historical sketch of the problems encountered in developing policy guidelines (designs) was prepared.

2.0 Preparation of A Program Description.

A copy of the Policy Manual, 1974, was carefully reviewed in order to prepare an accurate description of the compensatory component of EOF. This was an essential step to ensure that all persons involved directly or indirectly with the evaluation clearly understood the nature of the designs used by the Department to accomplish the goals of the program.

3.0 Assessing the Merit of the Program Goals, Designs and Implementation of Designs.

3.1 Survey of Participating Districts.

This component of the plan involved a two round modified Delphi study in all participating jurisdictions.

3.11 Round One Delphi.

An unstructured interview technique was used in round one. A total of forty-six interviews were conducted in all jurisdictions operating compensatory education projects. Persons interviewed included twelve superintendents, sixteen deputy and assistant superintendents, nine project supervisors and nine school board members.

3.12 Round Two Delphi.

A mail survey was combined with telephone interviews in round two. The number of ideas expressed by subjects during the personal interviews was far too extensive to attempt to recycle them in the round two questionnaire. It was decided, therefore, to use a sampling procedure that would result in a representative sample of the original ideas being recycled in round two and, at the same time, provide questionnaires short enough to enable respondents to discuss their views in a five or ten minute telephone conversation. To accomplish this, fifty representative quotations were selected from the round one interview data to form the round two questionnaire. After selecting the statements, a multiple matrix sampling procedure was used to randomly select and disburse quotations across all four respondent categories. Statements were randomly selected from the group of fifty quotations to form three questionnaires of nearly equal length. The questionnaires were then assigned randomly to eighty-one respondents in proportion to the number in each of the four respondent categories. The round two questionnaire was forwarded to all superintendents, deputy and assistant superintendents, project supervisors and school board chairmen in all participating jurisdictions. The sample included twenty-two superintendents, seventeen assistant and deputy superintendents, twenty-three project supervisors and nineteen school board chairmen. A summary of the response rates for this survey is shown in Table 1.

3.2 Survey of Non-Participating Districts.

The opinions of two groups in non-participating jurisdictions were sought. Questionnaires were administered in jurisdictions where attempts

TABLE 1

QUESTIONNAIRE RETURNS FOR ROUND TWO DELPHI IN PARTICIPATING DISTRICTS

MATRIX SAMPLE A

Respondent Category	No. Distributed	Initial Return	Follow-up Return	Total Return	Telephone & Mail Response	Mail Response Only	Total Useable Returns
Superintendent(S)	8	8	0	8	4	3 + (1)	7
Assistant & Deputy Superintendents(A)	6	5	1	6	4	2	6
Project Supervisors(P)	7	5	1	6	2	4	6
Board Members(B)	7	2	1	3	1	2	3
Total	28	20	3	23	11	11 + (1)	22
Per cent of Total Distributed	100%	71.4%	10.7%	82.1%	39.3%	42.8%	78.6%

( ) = nonuseable response

MATRIX SAMPLE B

Respondent Category	Total Distributed	Initial Return	Follow-up Return	Total Return	Telephone & Mail Response	Mail Response Only	Total Useable Returns
Superintendents(S)	7	4	0	4	1	3	4
Assistant & Deputy Superintendents(A)	6	6	0	6	4	2	6
Project Supervisors(P)	8	8	0	8	5	3	8
Board Members(B)	6	2	4	6	0	5 + (1)	5
Total	27	20	4	24	10	13 + (1)	23
Per cent of Total Distributed	100%	74.0%	14.8%	88.8%	37.4%	51.8%	85.2%

( ) = Nonuseable Response

MATRIX SAMPLE C

Respondent Category	Total Distributed	Initial Return	Follow-up Return	Total Return	Telephone & Mail Response	Mail Response Only	Total Useable Returns
Superintendents(S)	7	5	1	5	2	3	5
Assistant & Deputy Superintendents(A)	5	3	1	4	3	1	4
Project Supervisors(P)	8	5		6	5	1	6
Board Member(B)	6	3	1	4	0	4	4
Total	26	16	3	19	10	9	19
Per cent of Total Distributed	100%	61.6%	11.5%	73.1%	38.5%	34.6%	73.1%

had been made to gain approval for projects, but where approval had been denied, as well as in jurisdictions where no attempt had been made to secure compensatory funds.

3.21 Survey of Jurisdictions Denied Approval.

EOF files were searched to compile a list of individuals who had been unsuccessful in securing approval for project proposals. Questionnaires were mailed to persons expressing a willingness to participate in a telephone interview to discuss the strengths and weaknesses of policy guidelines.

3.220 Survey of Other Non-Participating Jurisdictions.

This component of the study also employed a modified Delphi technique, but mail questionnaires were used rather than interviews.

3.221 Round One Delphi.

In the first round, a mail questionnaire was forwarded to all jurisdictions which, in 1973, had not submitted proposals. The majority which chose not to apply were from jurisdictions ineligible under the 1973 EOF (Compensatory) guidelines. Superintendents or their designated substitutes were asked to assess the merit of the program goals and designs for accomplishing goals. It was not possible for this group to provide opinions about the strengths and weaknesses of the designs under operating conditions or program results.

3.222 Round Two Delphi.

In the second round, a mail questionnaire was forwarded to all those responding to the first one. The purpose of the second questionnaire was to obtain explanatory data in the light of initial findings from the first questionnaire. Where the results of the first questionnaire produced an affirmative or negative majority opinion, respondents were asked to state whether they agreed or disagreed with the majority and to provide their reasons. Table 2 presents a summary of the response rates from each of the two questionnaires used in the survey.

4.0 Assessing the Merit of Program Results.

4.1 Delphi Survey in Participating Jurisdictions.

Opinions of school superintendents, deputy and assistant superintendents, project supervisors and school board members were surveyed using the same procedure described in section 3.1. This consisted of a modified Delphi employing interviews during the first round and a mail questionnaire combined with telephone interviews in the second. Data for the program results component were collected at the same time and in the same interview setting as the other components studied. The benefits cited by the interviewees were used to form the basis of the round two questionnaire. As before, this questionnaire was administered to eighty-one respondents. All twenty-one jurisdictions were represented.

TABLE 2

QUESTIONNAIRE RETURNS: ROUND ONE AND TWO DELPHI IN NON-PARTICIPATING DISTRICTS

Questionnaire	Number Distributed	Initial Return	Follow-Up	Total Return	Useable Return	Percent Useable Return
One	70	49	13	62	52	74.3%
Two	49	33	NA	33	31	63.3%

4.2 Review of Project Evaluation Reports.

Project evaluation reports submitted to the Department by local school districts were analyzed in order to identify the outcomes resulting from projects funded by EOF (Compensatory). To collect comparable data from project evaluators it was necessary to standardize evaluation procedures and reporting formats to the greatest extent possible at each project site. This was accomplished by holding two three-day evaluation training workshops for all district level project evaluators and by preparing a standard reporting format for evaluators to use in reporting results.

4.21 Evaluation Training Workshops.

Evaluation training workshops were planned, in cooperation with the Field Services Branch of the Department of Education, for all project evaluators from the twenty-one participating jurisdictions.

4.22 Standard Report Form.

A standard report form which project evaluators could use in reporting results to the Department was prepared in cooperation with administrators of the Educational Opportunities Fund.

4.23 Content Analysis of Local Project Evaluation Reports.

Project evaluation reports were studied to determine the results produced by the program at each project site. A procedure called content analysis was used to elicit the required data.

VI SUMMATIVE EVALUATION FINDINGS:

PROGRAM GOALS, DESIGNS AND IMPLEMENTATION

A. A Report of Data Based on Interviews in All Participating Jurisdictions.

The following list of summary statements was prepared from transcripts of audio recordings made during interviews held in all participating jurisdictions. The statements have been rank ordered from highest to lowest according to the degree of support for them.

1. When EOF (Compensatory) was first introduced, government expectations were not clearly communicated because the program guidelines were unclear. Planning problems arose from the use of poorly defined terms in the initial set of guidelines such as "disadvantagement" and "cultural handicap." The guidelines presented in the Policy Manual, 1974 were somewhat better than the initial set. (Response Set #1)

2. Due to the nature of compensatory problems, longer term projects of three to six years are preferred to shorter, one and two year terms. (Response Set #2)

3. The written proposal requirement was a positive feature of the program because it encouraged districts to define problems, establish priorities and to formulate plans. (Response Set #3)

4. The evaluation requirement was a positive feature of the program. Evaluation was seen as a method of assessing current needs, improving the operation of projects and determining the effectiveness of completed efforts. (Response Set #4)

5. Integration of EOF projects was desirable, particularly at the instructional level; however, at the administrative level, keeping funding categories separate was a nuisance. (Response Set #5)

6. Project grants are preferred to grants based on pupil enrollments because they are more stable and also because they allow for funds to be distributed according to the severity of needs. (Response Set #6)

7. While it is important to have non-financial community support behind a project, the Department's expectation of financial support from local organizations and individuals in "disadvantaged" areas was unrealistic. (Response Set #7)

8. While parental support and involvement are desirable, the approval of compensatory projects should not depend upon commitment to obtaining such support and involvement. This requirement may result in efforts to contrive support with the resulting commitment demonstrated in the proposal document not being genuine. (Response Set #8)

9. The selection of students on a school attendance area basis was not a desirable feature of the program because it wrongly assumed that one would always find pockets of disadvantagement in school jurisdictions. (Response Set #9)

10. The expanded scope of the program, which included grades one to twelve, was a good feature. (Response Set #10)

11. Terms and labels such as "disadvantagement" and "culturally handicapped" should be used discreetly and possibly omitted entirely. (Response Set #11)

12. Service and cooperation from Regional Office staffs has been satisfactory or better, particularly in the area of project planning. (Response Set #12)

13. The government should provide funds for planning compensatory projects. Preparation of compensatory proposals is time-consuming and takes personnel away from their regular duties. There is a danger under the present system that the regular school program may suffer as a result. (Response Set #13)

14. The government should provide funds for the administration, coordination and organization of projects especially in those situations where project management places such excessive demands on available human resources that the quality of the regular school program is endangered. (Response Set #14)

15. The conditional approval category caused confusion. This confusion appeared to arise from the Department's failure to communicate its expectations about each of the conditions which it applied to a proposal and also failure to communicate the assurance to local project personnel that funds were guaranteed if the conditions were met. (Response Set #15)

16. The level of funding should be determined by the degree of need in an area and by the size, complexity and length of the project proposed. (Response Set #16)

17. The selection of target pupils should be based on educational data rather than cultural, social or environmental data. There are dangers in categorizing children for educational purposes on non-educational variables. Some concern was expressed about the meaning of, the criteria for, and the evidence required with respect to cultural, social or environmental disadvantagement. Educational criteria are more meaningful and are readily available to educators in local school systems. Collecting data on cultural, social or environmental disadvantagement locally, can be dangerous unless completely unobtrusive techniques are used. As educational disadvantagement is related to social and cultural disadvantagement, one would target almost the same pupils if educational data alone were used. (Response Set #17)

18. The initial qualifying criterion of economic eligibility is acceptable. School jurisdictions in economically deprived areas are usually less capable of providing the required level of financial support for compensatory projects, and there is generally a high incidence of educational problems in economically depressed areas. While there may be needs for compensatory education in all districts, with the current low level of funds appropriated by the government for compensatory education, it is reasonable to direct funds to those jurisdictions experiencing the greatest degree of financial hardship. (Response Set #18)

19. Earmarked grants or project grants are desirable for compensatory education. Earmarked or project grant funding helps to ensure that funds actually reach the intended targets. (Response Set #19)

20. Circumstances may exist where special consideration should be given to funding existing expenditures of school boards. In situations where those expenses arise from compensatory projects already in operation, which have objectives compatible with provincial compensatory program objectives, there is no reason why the Department should not give consideration to compensating local school boards for expenditures arising from existing projects. (Response Set #20)

21. While it is important that proposals be presented in writing, a face-to-face meeting with the Coordinator of the Educational Opportunties Fund would be valuable, particularly during the initial project planning phase. (Response Set #21)

22. The objective of the EOF (Compensatory) program was good and the intent of the government was clear. (Response Set #22)

23. It is acceptable to exclude physically, mentally and emotionally handicapped pupils from the EOF (Compensatory) fund, as grants to support programs for pupils with these handicaps are available from other sources. (Response Set #23)

24. The feature of the program which required local project personnel to provide the Department with documentary evidence of disadvantaged status from locally derived data was undesirable. (Response Set #24)

25. The emphasis on intensifying human resources at the classroom level was a positive feature of the program. (Response Set #25)

26. The coordination of funding with the Department of Indian Affairs was a good feature of the program. (Response Set #26)

27. The feature of the program which encouraged staff support for a project was desirable. (Response Set #27)

28. The Department should provide more assistance with the evaluation of projects. (Response Set #28)

29. Service and cooperation from the Regional Offices could be improved in the area of project evaluation. (Response Set #29)

30. The emphasis of EOF (Compensatory) on parental involvement was a positive feature of the program. (Response Set #30)

31. The Department should decide which areas in the province need compensatory funds and then announce the share of funds available to eligible districts. This would ensure that only those districts which were to receive funds would invest time and resources in the preparation of proposals. It would also eliminate competition which is perceived by some to be undesirable. (Response Set #31)

32. A minority cited disadvantages associated with project grant funding. Problems mentioned included: (1) the written proposal requirement was too complex and, therefore, very time-consuming; (2) areas which submit the best proposals may not be the ones in greatest need of funds; (3) the uncertainty about whether funds will continue at the end of a project makes long-range planning difficult; and (4) small jurisdictions are at a disadvantage because they lack the back-up resources to compete with larger districts. (Response Set #32)

33. The recycling of proposals several times to get them into a form acceptable to the Department was perceived by some to be a problem. (Response set #33)

34. Earmarked grants are not desirable. The Department should distribute funds and then trust districts to spend them in the best interests of the target pupils. (Response Set #34)

35. A project coordinator is essential, especially for large projects. (Response Set #35)

36. Because of the limited funds available, projects efforts should be concentrated at the lower grade levels to emphasize a preventive approach. (Response Set #36)

37. If there were a high proportion of native children in an area, the chances of getting a proposal were increased. (Response Set #37)

38. The Department should look into the possibility of compiling data which has already been collected by other social and governmental agencies. This may be useful in determining the areas of the province which have the greatest need for compensatory aid. (Response Set #38)

39. A single fund to support projects for all types of handicaps would be desirable. (Response Set #39)

40. Coordination between the Department of Education and the Department of Indian Affairs should take place at the provincial level. (Response Set #40)

B. A Report of Data Based on Mail Questionnaires and Telephone Interviews in All Participating Jurisdictions.

The results of this survey are summarized below. The statement presented in italics is a direct quotation from the interview transcripts reported in the foregoing section. The reactions of all superintendents, deputy and assistant superintendents, project supervisors and school board chairmen follow the quotation. The figures in parentheses reveal the percentage of the respondents agreeing or disagreeing with the quotation. A summary of their comments is also presented. Quotations are listed in rank order according to the degree of support for them.

1. *"The government's insistence on program evaluation is a good idea." (100.0% agree)*

Evaluation is necessary for accountability, but the Department's expectations for complex evaluations may be unrealistic. If the Department's expectations are not lowered, assistance should be provided to carry out evaluations.

2. *"Parental support for projects is desirable, but should not be a required condition of funding." (95.8% agree)*

Parental support for projects is often particularly difficult to obtain in a disadvantaged area; therefore, by making eligibility for funding dependent upon this type of support, funds may be denied to those areas most in need of them.

3. *"The objective of EOF (Compensatory) is 'a desirable objective'." (95.8% agree)*

Since the statement is a general one, its desirability may depend upon its interpretation. The objective would be less value laden if the emphasis was placed upon educational disadvantagement rather than social and cultural differences or environmental disadvantagement.

4. *"Allowing integrated projects which are administratively separate at the provincial level, but which encompass both the Elementary and Compensatory components of EOF as well as ECS, LDF and others, is a positive feature of the policy guidelines." (92.9% agree)*

Such an integrated approach provides the best service. Allowing local districts to also integrate funds at the local level may be desirable as well.

5. *"A positive feature of the Fund was that it was for all school pupils in grades one to twelve in all districts eligible for compensatory funding." (92.9% agree)*

The expanded scope gives districts the flexibility to concentrate funds on the areas of greatest need and to accommodate needs at every grade level. For compensatory funds to be used most effectively, however, they should perhaps be concentrated on the lower grade levels.

6. *"While there may be certain disadvantages associated with the funding of compensatory education projects on the basis of approved proposals, generally the written proposal requirement represents a positive feature of the Fund." (92.9% agree)*

Written proposals have the drawback of being very time-consuming to prepare, but this requirement should be retained because it promotes effective planning.

7. *"The Department should not restrict funding to individual school attendance areas. Districts should have the option of submitting several school level proposals or one system level proposal or a combination of both." (91.7% agree)*

Having the option of submitting a system level proposal would be desirable because better coordination and leadership would develop and repetition would be avoided. Funding on the basis of school attendance areas wrongly assumes that one will always find pockets of disadvantagement within the boundaries of school jurisdictions.

8. *"The emphasis in EOF (Compensatory) on the human resource component at the classroom level is a positive feature of the Fund." (91.3% agree)*

Children in compensatory programs will benefit most from help provided directly by the human resource component. Material resources are also important, however, and the Department should provide adequate funds for this component where needs warrant this type of support.

9. *"While I am in favour of writing a proposal for the educational program itself, I am not in favour of having to carry out a thorough study, documenting disadvantaged status in order to prove to the government that we are a disadvantaged area." (91.3% agree)*

The required documentary evidence may already be available from other governmental and social agencies, and all that may be needed is for the Department to compile such data. It is extremely difficult for a district to collect objective sociological and cultural data from local sources. Further, such an activity is a demeaning process for local district people to go through.

10. *"The objective of EOF (Compensatory) is 'a good goal statement'." (87.0% agree)*

There is a need, however, to define terms such as 'equal footing' and 'other students' more clearly. It is a good goal statement because it gives direction without specifying exact procedures.

11. *". . . (Economic, social, cultural and educational variables) must be considered when attempting to establish which jurisdictions are eligible for funding." (87.0% agree)*

While one cannot quarrel with the statement in principle, in actual practice, difficulties may arise as the more variables considered, the more complex needs assessment procedures become. Establishing district eligibility on the basis of all four variables is very inefficient. Educational disadvantagement may be the most pertinent criterion of the four mentioned.

12. *"Before expecting extensive and elaborately written proposals, the Department should, first of all, give approval in principle to a project idea." (85.7% agree)*

This procedure would help to prevent districts from spending large amounts of time preparing proposals which, in the end, are rejected. After the Department gives approval in principle to a project, it should make its expectations very clear, in order to prevent needless recycling of proposals.

13. *"The split between human and material resources in the funding of a project should be flexible and determined by the nature of the project." (85.7% agree)*

This flexibility would be desirable because it would allow for changes which may be needed as the project progresses. However, delivery of human educational services should remain an emphasis.

14. *"We would prefer to deal directly with the EOF Coordinator instead of the ROE. We are interested in having communication channels with the Department that are clear, open and fast so we can get a quick reply, and I think dealing with the Department enables us to do that." (85.7% agree)*

The ROE are not always able to give districts the information they need, and to operate through them introduces delays and inconvenience. Nevertheless, ROE should be retained as they provide good support services for compensatory projects.

15. *"Concerning the target population for the Fund (culturally, socially and environmentally disadvantaged pupils i grades one to twelve), the Department never clearly made known how these pupils were to be identified." (82.6% agree)*

Districts which are eligible for compensatory aid cannot normally afford to supply the extra planning costs which, under the present setup must come from the local school system. As it may be difficult to anticipate all extra costs and include them in a proposal, an error factor of 5% to 10% of the total submission should be built in.

17. *"Excluding the physically, emotionally and mentally handicapped from compensatory funding is a positive feature of the present guidelines." (82.6% agree)*

As long as children with these handicaps are provided with adequate programs through other funding sources, it is fair to omit them from compensatory funding.

18. *"The point that we wish to make very strongly is that we would like to see some clear definition that would enable us to identify students for compensatory education on the basis of educational data." (79.2% agree)*

The school should stay within the bounds of its objectives and concentrate on improving student performance. Focusing on social, cultural and environmental variables introduces an unnecessary stigma.

19. *"Funding of projects in proportion to their nature, size and scope rather than on a fixed per pupil basis is a positive feature of the present policy guidelines." (78.6% agree)*

Project funding is more stable than funding based on pupil enrollments as the amount available does not change with fluctuations in the student population. It also allows more flexibility in targeting funds to the areas in greatest need.

20. *"Because funds are limited, districts should be told what the ceiling figure is for their jurisdictions before beginning to write a proposal." (78.6% agree)*

This would eliminate some of the frustration and inefficient use of time which resulted under the present system. Ceiling figures would keep project proposals realistic. At the same time, they should be flexible enough to rise and meet the level of assessed needs.

21. *"The government's objective for EOF (Compensatory) has not been accomplished . . ." (78.6% disagree)*

The objective is definitely in the process of being achieved and funds should continue so that school boards will come closer to the ideal of providing an 'equal educational footing' for all.

22. *"A good feature of the present method of funding compensatory education which calls for written project proposals is that school boards can be held accountable for the funds." (78.3% agree)*

However, there are other good features of project grant funding besides accountability. Project grant funding does not, in itself, ensure accountability. Monitoring local evaluations might further ensure accountability.

23. *"The preferred method of funding compensatory education is through a combination of project funding and formula funding." (73.9% agree)*

The two methods are not mutually exclusive and, therefore, may be combined to achieve desirable results. The desirability one way or the other, depends largely on the nature of the formula devised.

24. *"The objective of EOF (Compensatory) is an ideal which can never be accomplished." (73.9% disagree)*

The objective is an aim towards an ideal - an ideal of equality for all - and in this sense, it is being achieved. The government should continue to fund compensatory education because the needs for it are real and gains are being made in the direction of the aim.

25. *"The Department should move compensatory education from a three year project cycle into a five year cycle." (71.4% agree)*

A longer cycle would add security to the projects and would allow for long range planning. Also, it takes a long time to achieve aims in compensatory and results obtained after a five year project term would give a better indication of a project's success than would an evaluation after a three year term.

26. *"While funding compensatory education on the basis of Department approved proposals has certain disadvantages, it is much preferred to formula funding." (71.4% agree)*

Project grant funding is desirable because it helps to ensure that funds reach the intended targets, and it allows more flexibility. The written proposal requirements also promote better planning.

27. *"A disadvantage of the present EOF (Compensatory) policy guidelines is that some districts may work for weeks or months on a proposal without any funding, and then in the final analysis, be deemed ineligible." (70.8% agree)*

Resources expended in setting forth an elaborate proposal, which is not approved, are not recoverable. The Department should give consideration to giving tentative approval to brief proposals before allowing districts to put a lot of work into developing elaborate ones. The Department could also identify those areas which need and will receive funds and then have these school systems prepare proposals to show how the funds will be used.

28. *"The Department of Education should devise a way to disburse funds in proportion to need which does not require a board to spend money to get money." (70.8% agree)*

One way in which this may be accomplished would be for the Department to provide funds earmarked for needs assessment. Another way may be for the Department to work cooperatively with local districts in a joint approach to needs assessment.

29. *"Some districts may have pressing needs for compensatory education, but cannot participate in the fund simply because they do not have the time or the personnel capable of writing extensive proposals of the type expected by the Department." (66.7% agree)*

To overcome this problem, the Department could make several changes in the written proposal requirement: (1) modify the guidelines making precise statements which clearly make expectations known; (2) provide a standard blank form with space to fill in the required information; (3) encourage face-to-face meetings between representatives of local districts and the Department to discuss proposed plans; (4) provide money for planning in those districts which need it; and, (5) upgrade the level of knowledge and expertise in the province relative to project development, implementation and evaluation through in-service education programs.

30. *"To expect financial support from other local organizations and individuals in a disadvantaged area is unrealistic." (65.2% agree)*

While this support may be desirable and, in some cases possible, the Department should not make access to the funds dependent upon a district's ability to obtain this support. Non-financial support from these areas would be a more realistic expectation.

31. *"Economic, cultural and social disadvantagement tend to culminate in marked educational disadvantagement. Therefore, by selecting the educationally disadvantaged, one would target almost the same pupils." (64.3% agree)*

Although there is not a complete parallel between educational disadvantagement and other types of disadvantagement, many culturally, socially or environmentally deprived children do have unique educational problems. The Department could clarify the guidelines by using educational disadvantagement as the basis for identifying the target groups for compensatory education.

32. *"The approval process could be speeded up by allowing district level personnel to present a proposal verbally in a face-to-face meeting with the policy committee or coordinator of the Fund." (62.5% agree)*

The communication provided by such a meeting would enable Department personnel to clarify written policy statements and identify potentially ineligible proposals, thus preventing district personnel from wasting valuable time and efforts.

33. *"The Department should conduct a province-wide needs assessment for compensatory education in order to determine those districts which have pressing need for it." (62.5% agree)*

The preferred way to approach such a task would be through a cooperative effort between the local district and the Department or another external group appointed specifically for that purpose. The required data for such a needs assessment may already be available and all that may need to be done is to compile existing information. A province-wide needs assessment would ensure that districts most in need of help would get it and it would eliminate competition which is undesirable. A danger of such an assessment is that it may result in a formula which would destroy current flexibility.

34. *"Rural districts having equalized assessments per pupil of less than $4,000.00 do not have to document disadvantaged status. This is a positive feature of the guidelines which should be retained." (60.9% agree)*

Excluding the poorer districts, which do not have the necessary resources to conduct a thorough needs assessment, is a fair practice. As a guideline or a proxy indicator of need, equalized assessment per pupil is acceptable, but in all cases, the Department should be aware that special circumstances may warrant special consideration. Some consideration should be given to other proxy indicators of need, such as annual income data. If equalized assessment was used as the sole criterion of eligibility, it would prevent districts in those areas having high equalized assessments from presenting a special case for funding and therefore, children in need of compensatory assistance in those areas would be denied the opportunity to receive help.

35. *"Local school boards should be expected to contribute a share to the total funding of a project." (58.3% disagree)*

The systems with the greatest need for compensatory funding are least able to contribute funding to a project. A board's contribution should depend on its ability to contribute.

36. *"Under the present policy guidelines, the EOF will fund new programs, extensions or modifications of existing programs, but will not fund existing expenditures of school boards. This is a positive feature of the Fund." (58.3% agree)*

This is acceptable since the compensatory fund is intended to supplement or extend the services provided under regular school programming; however, rigid adherence to this guideline may unduly discriminate against progressive boards which introduce compensatory programs on their own.

37. *"The government should retain the objective as a goal statement, but it should devise a way to clearly identify the target group." (58.3% agree)*

There was generally strong support for the first part of the statement, but less for the second part. Two points were brought out in the discussion of this statement: (1) the Department should look into the possibility of using available social, cultural or economic data to identify those geographic areas (jurisdictions, school attendance areas, etc.) which are in need of compensatory and which should receive funds; and (2) student identification and selection for participation in compensatory projects should be left up to local people. Selection methods used at the local level should be as unobtrusive as possible and, perhaps, the basis for selection should be academic performance.

38. *"The feature of the guidelines which allows non-school personnel to submit proposals to school boards is of doubtful value." (57.1% agree)*

The professional is in the best position to evaluate and determine childrens' educational needs. Also, non-school personnel may find it difficult to write an acceptable proposal on their own. The Department's expectations should be made more clearly known on this point. More elaboration in the guidelines would be helpful.

39. *"The competitive nature of funding under EOF (Compensatory) was definitely a negative feature." (57.1% agree)*

Competition for funds is undesirable because districts which are able to prepare the best proposals may not be the ones in greatest need of funds. Further, areas having the largest back-up of human and financial resources are at an advantage in competitions.

40. *"The Department did not provide clear guidelines for identifying culturally, socially or environmentally disadvantaged students. Our problem is in identifying who those students are." (57.1% agree)*

The findings are equivocal on this statement as the respondents generally agreed with the first statement and disagreed with the second. The discussion brought out the following points: (1) the initial guidelines were unclear; and (2) local district personnel have no difficulty identifying children in need of compensatory assistance.

41. *"The terms cultural, social or environmental handicap are undesirable labels which you must really play down or you can stigmatize a group." (54.2% agree)*

Stigmatizing labels such as these would not be needed if the emphasis was placed on educational deficiencies.

42. *"Under the present policy guidelines, the EOF will not fund positions which have as their major emphasis, planning, administrative, coordinative or organizational activity.*

> *This is a positive feature of the Fund and should be retained." (54.2% disagree)*

Some recognition should be given to these activities because under the present system, both the regular school programs and the compensatory projects suffer. The additional projects place a strain on the existing administration and regular programs suffer from the extra work load. The projects may not be thoroughly planned or coordinated and are endangered as well by the lack of funding of these positions.

43. *"The Department should make more funds available for the evaluation component of compensatory projects." (52.2% agree)*

Projects should be thoroughly evaluated, but this evaluation should not place a strain on the budget of the regular program, nor should it draw funds away from the instructional component of a project. Funds made available for the evaluation of projects would likely bring returns in terms of instructional improvement.

44. *"A district may have need for funds, but may not have the personnel or the time to prepare a proposal impressive enough to be approved; therefore, it does not necessarily follow that 'if you cannot write a proposal to show a need for a service, you do not have much real need for the money'." (42.9% agree, 50.0% disagree)*

In those jurisdictions not having staff with the necessary level of expertise or the time, the Department should provide funds for proposal writing.

45. *"I do feel that if compensatory education was funded on a formula basis alone, there would be a tendency to feel somewhat lax in identifying needs, specifying objectives and formulating procedures."*

While there was no clear majority of opinion regarding this statement, the predominant response was in the affirmative. (47.8% agree)

There are other factors which affect the amount of planning done by a district; for example, the desire for self-improvement. Planning steps and accountability could be built into formula funding.

46. *"The larger urban systems in Alberta should not be allowed to tap the compensatory fund. They have the tax base and resources and could provide compensatory education if they really wanted to."*

While there was no majority opinion on this point, the predominant response was in the affirmative with 45.8% agreeing.

Needs for compensatory education exist in every district, including the larger urban centres.

47. *"The outright project grant with no defined maxima or minima is much preferred to the per pupil grants for compensatory education."*

While there was no majority opinion on this point, the predominant response was in the affirmative with 45.8% agreeing.

The pupil grant is more convenient. Districts know what they are getting and planning may be easier. However, project grant funding may be more appropriate for compensatory education because it allows for funding in proportion to the severity of need in an area. Per upil funding would tend to place most of the funds in the urban areas, while rural areas may actually have the greatest need for compensatory funding.

48. *"As far as the compensatory component of the Educational Opportunities Fund is concerned, a comprehensive system-wide proposal is much preferred to individual school or classroom level proposals."*

While no clear majority emerged on this statement, the predominant response was negative with 43.5% disagreeing.

Classroom level projects reflect the unique needs and situations in a school and they promote direct involvement of those who planned them, thereby building in committment. On the other hand, a comprehensive, system-wide proposal may have the advantages of developing better leadership and cooperation, and allowing for better control and supervision of projects.

49. *"It became clear to us before long that the compensatory target children were really supposed to be those of native ancestry."*

While there was no majority opinion expressed about this statement, the predominant response was negative with 41.7% disagreeing.

It appears that the sentiments expressed in this statement were not widely held throughout the province.

50. *"The Department should discontinue funding on the basis of written proposals and move more in the direction of formula funding, but specify the target for the funds to ensure that they go where the government wants them to . . ."*

The respondents were predominantly undecided on this point (41.7%) as such a decision would really depend on the nature of the formula.

C. A Report of Data Based on Telephone Interviews With Persons In Jurisdictions Denied Approval for Compensatory Funds.

Respondents in jurisdictions denied approval for compensatory education projects have described their experiences as frustrating, bitter and annoying. In at least one instance, the level of frustration reached has convinced those involved that future efforts to secure approval for proposals would be futile. They were all left with the clear impression that the government did not have policy matters clearly defined. Several persons made an appeal to the Department to implement strategies that would prevent other districts from having an experience similar to theirs.

D. A Report of Data Based on Mail Questionnaires Administered in Other Non-Participating Jurisdictions.

The following summary is based upon the results of two questionnaires administered to superintendents or their designates in non-participating districts. Figures are presented in parentheses which represent the questionnaite item and percentage response to each item.

In summary, it may be said that on the basis of the information provided by the questionnaires, superintendents whose jurisdictions have not qualified for EOF (Compensatory) funds are:

1. generally in sympathy with the objectives of the EOF program (1:89.6%, 2:85.4% agree),
2. generally in sympathy with the objective of the compensatory component of EOF (5:79.2% agree),
3. generally in sympathy with the emphasis of the Fund on delivering human educational resources at the classroom level which are of direct assistance to teachers and students (7:81.3%),
4. generally in sympathy with EOF funds being allocated for elementary education and compensatory education (2:79.2% agree),
5. generally in sympathy with the emphasis on providing funds for public and separate school students in grades one to six (3:87.5% agree),
6. generally in sympathy with preparing a project proposal after having established eligibility on the basis of economic and educational factors (19:75.0% agree),
7. generally in sympathy with the project proposal requirement which calls for assessing needs, defining problems, specifying objectives and establishing evaluation procedures (20:81.3% agree), and
8. generally in sympathy with the Department's program requirements which places emphasis on offering new or different strategies for teaching the basic skill subjects, attempts to improve the disadvantaged child's self-concept and facilitates psychomotor development through physical education endeavours (21:75.0%; 81.3%, 70.8%).

While the support for some features of the program was not strong, it may be said that the superintendents whose jurisdictions have not qualified for funds:

1. moderately support the public relations objective of EOF (60.4% agree),

2. moderately support the definition of the target population: the culturally, socially or environmentally disadvantaged students in the province at all grade levels from one to twelve (4:68.8% agree),

3. moderately support the feature of the guidelines which requires local districts to provide documentary evidence of educational disadvantagement after having established eligibility on a jurisdiction-wide or school attendance area basis (60.4% agree),

4. moderately support the Department's definition of educational disadvantagement (62.5% agree), and

5. moderately support the appropriation of funds on an outright project grant basis where payment is determined by the nature, size and scope of the project (62.5% agree).

While it may be said that, for the most part, the superintendents whose jurisdictions have not qualified for funds generally support the EOF (Compensatory) program, there are specific features which cause concern. In general, it may be stated that the superintendents are:

1. concerned that pupils whose primary handicap is mental, emotional or sensory are excluded from the compensatory fund (6:41.7% agree),

2. concerned that funds are not provided for positions which have as their major emphasis planning, administrative, coordinative or organizational activity (8:48.0% agree),

3. dissatisfied with the initial economic criterion of eligibility: only those rural jurisdictions having an equalized assessment of less than $4,000 per pupil are eligible for funding on a jurisdiction-wide basis (9:14.6% agree),

4. concerned that only resident pupils may be included in calculating equalized assessment per pupil (10:41.7% agree),

5. concerned that large urban jurisdictions receive compensatory aid (11:33% agree),

6. dissatisfied that rural jurisdictions with equalized assessment per pupil figures in excess of $4,000 have to compete for funds (12:20.8% agree),

7. concerned with the feature of the guidelines which requires local districts to provide the Department with documentary evidence of environmental disadvantagement (13:41.7% agree), and

8. concerned that the maximum allowable grant per educationally disadvantaged is $200 (18:39.6% agree).

Superintendents are concerned that current regulations are unwittingly preventing some children who need help from obtaining the benefits of compensatory programs, especially native children, "small pockets" of disadvantaged children and those with mental, emotional and sensory handicaps. They are dissatisfied with many aspects of the specific funding arrangements being used to implement the program, and with the 'red tape' and administrative expense now required to document need and prepare a proposal. They would like to have a simplified documentation and application procedure which would not discriminate against smaller jurisdictions with fewer human and financial resources.

VII SUMMATIVE EVALUATION FINDINGS:

PROGRAM RESULTS

A. A Report of Data Based On Interviews.

Based on interviews held in all participating districts, opinions expressed by school superintendents, deputy and assistant superintendents, project supervisors and school board chairmen revealed the following results of the EOF (Compensatory) program. The findings are rank ordered from highest to lowest in order of the degree of support for them.

1. Student attitudes toward school have improved. (Response Set #1)

2. Students' level of self-confidence has increased. (Response Set #2)

3. The general response to compensatory education has been favourable. (Response Set #3)

4. Project staffs' instructional skills and knowledge have improved. (Response Set #4)

5. Student level of academic performance has improved. (Response Set #5)

6. Project staffs' program development skills have improved. (Response Set #6)

7. Staff morale in participating districts has improved. (Response Set #7)

8. Local projects have increased awareness of the intensity of the need for efforts of a compensatory nature. (Response Set #8)

9. EOF (Compensatory) funds have helped to sustain the level of funding for classroom instruction as overall operating costs increased. (Response Set #9)

B. A Report of Data Based on Mail Questionnaires and Telephone Interviews.

A representative sample of quotations from the interview data, recycled in a follow-up questionnaire, produced the following results. The statements in italics are direct quotations from the interview transcripts. The opinions of school superintendents, deputy and assistant superintendents, project supervisors and school board chairmen follow each quotation. Quotations are rank ordered according to the degree of support for them.

1. *"Compensatory education has enabled districts to use new and unique ways of teaching the skills subjects of reading and mathematics." (100.0% agree)*

Home and community involvement projects, small group instruction, and individualization have been used. The opportunity to use new methods was a very desirable outcome of compensatory funding.

2. *"There is fairly strong evidence to suggest that EOF (Compensatory) has improved student attitudes and motivation." (100.0% agree)*

Evidence comes from objective evaluations of projects as well as subjective reports of parents and teachers.

3. *"There is fairly strong evidence to suggest that EOF (Compensatory) has increased the level of self-confidence and self-respect of 'disadvantaged' students." (87.0% agree)*

This evidence has come from reports of teachers, parents, aides and others significant in the lives of the students. Although this evidence is largely subjective, it was felt by the project personnel to be strong enough to be an encouraging result of the program.

4. *"Community reaction to EOF (Compensatory) is favourable." (85.7% agree)*

In many areas community members, and particularly parents, gave good evidence of support for projects. In other communities, communication between communities and schools should be improved so that the community members would really understand compensatory education.

5. *"There have been improvements in instructional skills and knowledge since EOF (Compensatory) was introduced . . ." (83.3% agree)*

Improvement was most pronounced in skills related to diagnosing student needs. The improvement in the instructional area may be due partly to improved planning and communication.

6. *"There is fairly strong evidence to suggest that EOF (Compensatory) has increased the student level of mastery of reading, mathematics, and language." (86.6% agree)*

Appreciable gains were produced in the basic skill areas of reading, mathematics and language. Teacher observations also provided evidence to support the statement. The gains may have been partly due to the increased opportunity for individualized instruction and the remedial programs which the projects afforded.

7. *"Our project evaluation results contain a good balance of opinion data and test scores." (78.6% agree)*

A "good balance" depends on the nature of the project. The Department should increase the resources for the evaluation component so that school systems can carry out more thorough and technically adequate evaluations of their projects' effectiveness.

8. *"Since the inception of EOF (Compensatory) there has been an increase in professional growth of teachers." (70.8% agree)*

Some teachers involved in the projects have shown greater interest through direct involvement, and have improved their instructional competencies. Involvement in project planning may be a factor contributing to professional growth.

9. *"There has been an improvement in staff morale since the inception of compensatory education in 1973." (65.2% agree)*

The improvement noted might be a result of teachers having the opportunity to give the students who need extra help the attention they require. Children who had formerly caused teacher frustration received help, and increased student level of achievement brought encouragement to the teaching staff.

10. *"It is possible that there has been an increase in the interest which parents have taken in their children's education since EOF (Compensatory) was introduced." (58.3% undecided)*

The reaction of parents has not yet been measured and therefore no strong support for the statement was found.

C. A Report of Data Based on A Review of Project Evaluation Reports.

The findings presented in this section are based on the results reported by project evaluators. The results presented in reports were sorted into categories according to the type of data supporting them. Two major categories were used: (1) results based on test data, and (2) results based on opinion data. Each of these major categories was further sub-divided. The first one, test data, was divided into cognitive measures and attitude measures, and the second one into opinions reported by students, parents, teachers, and others. The source of the data was not disclosed to protect the anonymity of project staffs and evaluators. Due to the large volume of information available, only a few representative comments could be reproduced here to convey to the reader the general trends evident in the reports reviewed.

1. Results Based on Test Data.

(a) Cognitive Measures.

Projects designed to improve performance in the basic skills areas of reading, language and mathematics were generally found by project evaluators to be producing positive gains.

> *In the most significant and emphasized aspect of the evaluation, objective performance changes, most students showed dramatic gains in all language arts and reading areas examined.*
>
> *Grade four and five Distar Language students exceeded their expected gains by significant amounts.*
>
> *Considering the total vocabulary scores, the mean gain for all grades 3-6 students was .57 G.E./year; the expected gain was .58 G.E./year.*
>
> *Though the target population's scores expressed in grade equivalents are not exceedingly high, when calculated as a "rate of progress" for a school year, indicate substantial progress over previous non-project years.*
>
> *The percentage of 4th year students achieving below their grade level in reading has decreased from 71% to 34% as measured by Gates-MacGinitie Test.*
>
> *The percentage of 3rd year students achieving one year or more below their grade level has decreased from 72% to 16% as measured by the Sucher-Allred Word Recognition Test.*

(b) Attitude Measures.

Project evaluators reported no appreciable improvement in student attitudes based on the measures used, eg. Coopersmith Self-Esteem Inventory, Colorado Reading Attitude Inventory, Smile Test, I.P.I. Mathematics Attitude Questionnaire (Part C).

Project evaluators generally qualified their results by stating that attitude change takes time and that in the space of a few short months between pre-tests and post-tests, gains might not be great enough to be detected by currently available insensitive instruments.

> *There were no significant differences between the program and control students on the personality and attitude measures during pre-tests. However, control students reported significantly better attitudes toward school on the post-*

> *tests. There were no other significant post-test differences.*

2. Results Based on Opinions.

(a) Opinions Expressed By Students.

Project evaluators surveying student opinion found that generally students were pleased with the extra help provided. The following set of comments, by students, presented in one evaluation report speak for themselves.

> *It (reading) became easier to do.*
>
> *I never read over four books last year.*
>
> *I never used to get interested in books and now I do.*
>
> *Because I know what I'm reading for . . .*
>
> *Now, with more selection, I sometimes read for a long time at night.*
>
> *A year ago I wasn't reading much, but now I like to read a lot. I wish this program had this influence on all the students.*
>
> *Keep the interesting books coming in.*

(b) Opinions Expressed by Parents.

Project evaluators generally reported that parents felt the program helped their children and favoured its continuation.

> *Parents report they are happy with the class effect on their children. They are generally pleased to see their children so happy.*
>
> *Parents have become less reluctant to send their children to school.*
>
> *For the most part, a majority of the parents reported that their children had improved to some or a great extent this year as compared to last in all areas questioned.*
>
> *Reported improved oral language skills, attitudes towards school in general and improved reading skills as being the areas in which their children had made greatest gains.*

(c) Opinions Expressed by Teachers.

Generally, project evaluators found that teachers favoured the program. The majority of teachers reported that it was really benefitting students.

> *This is one of the better programs that the government has funded. I sincerely hope that it continues.*
>
> *A project like this is extremely valuable to acquire resource materials and equipment which otherwise the pupils would greatly miss.*
>
> *The EOF project has provided some stimulating learning experiences out of the "classroom," which are quite beneficial to most students.*

(d) Opinions Expressed By Others

A comment made by a librarian shows an indirect outcome of the EOF Compensatory Program:

> Library use -
>
> *In comparing circulation figures for this school year and previous years, a marked increase in the number of books borrowed is evident. The increase is most noticeable in the area of recreational reading. The students are very enthusiastic about the arrival of new books, especially paperbacks, and are always eager to see "what's new" on the shelves. Not only have more students been borrowing more books, but they have also shown a greater interest in the selection of books and periodicals for the library. Many good suggestions have been forthcoming from students of all ages.*

Data presented in local project evaluation reports, based on cognitive and attitude measures, reveal that EOF (Compensatory) -

1. improved the performance of target children in the basic skills areas of reading, language and mathematics,
2. provided no appreciable improvement in student attitudes.

It appears that EOF (Compensatory) has strong support from the various groups surveyed:

(a) Students have reported developing interests in reading which were non-existent prior to the program.

(b) Parents report that their children are happier, that they have improved attitudes toward school, that they take a greater interest in matters relating to school work and that generally school performance has improved. Parents would like to see the program continued.

(c) Teachers are pleased with the opportunity to use new materials which provide more stimulating learning experiences for their students and are pleased that their efforts are being rewarded with improved student performance.

OBSERVATIONS ABOUT PROJECT EVALUATIONS

Based upon visits to project sites, discussions with project evaluators and reviews of project evaluation reports, it may be said that project evaluators have made substantial efforts to do the best work possible within the constraints imposed on them. It was evident that the majority of the project staffs felt a high sense of responsibility to demonstrate wise use of compensatory funds. Only a few reports were examined where the quality of the work presented might raise questions about the seriousness with which project staffs approached the task.

In spite of the excellent efforts made by many people, there is room for improvement. While it appears that the level of commitment of local project staffs is not a constraining variable, there are other constraints which have limited the quality of the reports submitted. For this reason results reported in this section must be interpreted cautiously.

The following is a list of major constraints imposed on local project evaluation endeavors. If the quality of project evaluations is to improve, the Department must take steps to help remove these constraints.

1. Lack of Human Resources.

At many of the project sites, local evaluators carried on full-time duties as teachers, principals, supervisors of instruction and assistant superintendents. Evaluation of compensatory education projects had to be undertaken in addition to regular duties.

2. Lack of Financial Resources.

Limited evaluation budgets, in many project proposals, prevented local school system administrators from hiring personnel with the necessary skills to do good evaluation work. Project developers, not being aware of the high cost of good evaluation, failed to build-in adequate budgets in their proposals.

3. Lack of Trained Evaluators.

Some districts, with adequate evaluation budgets, attempted to hire project evaluators, but were unsuccessful because no one was available with the necessary skills, training or experience.

4. Lack of Experience in Evaluation.

Formal evaluation, of the type required under the compensatory component of the Educational Opportunities Fund, was new to education in Alberta when it was introduced in 1973. Few people at the local level had the necessary training or experience to be able to understand and/or implement the Departments' expectations for project evaluation.

5. Lack of Consultative Assistance

Limited consultative assistance was available for EOF project evaluations. The large number of EOF projects funded through the Elementary and Compensatory components placed great demands on the consultative services provided by Regional Offices. A shortage of staff, compared to need, resulted in the ROE services being spread thinly over more than five hundred projects. The implementation of EOF in Alberta has created a need for more staff at the Regional Office level with training and experience in program evaluation.

VIII CONCLUSIONS AND RECOMMENDATIONS

The purpose of this study was to evaluate the compensatory component of EOF. The study addressed eight general questions. The questions corresponded to the four program components which served as the primary points of focus.

In the discussion which follows, answers to the following four questions are presented as conclusions (C).

What is the merit of the goals that were chosen?

What is the merit of the designs that were chosen?

What were the strengths and weaknesses of the designs under operating conditions?

What is the merit of the results produced by the program?

Answers to the following four questions are presented as recommendations (R).

What changes might improve the goals?

What changes might improve the designs?

What changes might improve the designs under operating conditions?

Are the results of sufficient merit to warrant continuing the program?

Where considered appropriate, a discussion follows selected conclusions and recommendations. The discussions are intended to clarify or amplify conclusions and recommendations.

A. Program Goals.

C1: The objective of EOF (Compensatory) is a desirable objective.

Discussion

Superintendents in the non-participating districts were generally in sympathy with the objective of the compensatory component of the Educational Opportunities Fund. Superintendents, deputy and assistant superintendents, project supervisors and school board members in the participating districts strongly supported the objective of EOF (Compensatory).

C2: The objective of EOF (Compensatory) is a good goal statement.

Discussion

Most respondents agreed that the intent of the government was clear and that the objective was a good goal statement, as it gives direction without specifying exact procedures. They do not agree that the objective is an ideal which can never be accomplished. It is an aim toward an ideal, an ideal of equality for all, and in this sense it is definitely being achieved. The majority agreed that funds should continue to be made available so that school boards will come closer to the ideal of providing equal educational opportunities for all.

R1: RETAIN THE OBJECTIVE OF EOF (COMPENSATORY) AS A GOAL STATEMENT, BUT PROVIDE CLEAR GUIDELINES AND/OR CONSULTATIVE ASSISTANCE TO LOCAL PROJECT PERSONNEL WHICH WOULD ENABLE THEM TO SPELL OUT DESIRED STUDENT BEHAVIORS IN CLEARLY DEFINED EDUCATIONAL PERFORMANCE OBJECTIVES.

Discussion

The objective of EOF (Compensatory) is a good goal statement, but because of its generality and because some terms do not lend themselves to clear definition, problems can arise at the local level in attempting to develop means to accomplish it. Further, because social and cultural values are implicit in the objective, some groups might feel stigmatized when the value connotation becomes visible at the local level. In view of these considerations, it would be desirable for the government to provide project personnel with clear guidelines which would not require the use of terms at the operational level which connote cultural, social or environmental inequalities. Further, because educational variables are easier to define than social, cultural or environmental variables, project objectives should spell out desired student behaviors in educational performance terms. Where local project personnel do not have the expertise or the resources to develop such objectives, the Department should provide assistance or support.

B. Program Designs.

C3: When EOF (Compensatory) was first introduced, the Department's expectations were not clearly communicated because the policy guidelines were not well defined.

C4: A number of features of the policy guidelines, presented in the Policy Manual, 1974, need to be revised.

Discussion

The following is a list of features of the guidelines which generally have caused problems under operating conditions in the majority of districts surveyed. A short quotation is presented following each problem area to indicate the section of the Policy Manual, 1974, concerned. The notation in parentheses refers to the recommendation(s) in Section VIII, part C, which address(es) each of these problem areas.

a. project length: "one, two and three-year projects. . .," p. 1. (R24, R25)

b. financial support from local organizations and individuals: "Financial . . . support of other local organizations and individuals is perceived as evidence of local involvement and commitment," p. 2. (R31)

c. parental support: "parent . . . support essential," p. 2. (R6)

d. selection of districts on the basis of economic criteria: ". . . a district's financial capability to mount the extended educational programming effort necessary . . ." p. 8. (R36, R37, R38, R39)

e. selection of students on a school attendance area basis: "Those ineligible on a jurisdiction-wide basis may qualify for initial economic eligibility [on a school attendance area basis] where . . .," p. 9. (R40, R41, R42, R43, R44, R45, R46)

f. use of certain terms and labels ". . . cultural or social 'handicap' . . .," p. 1; ". . . culturally, socially or environmentally disadvantaged students. . .," p. 3. (R1)

g. Regional Offices: "Operational Functions in Relation to the EOF," p. 5, item 5. (R32, R33, R35)

h. providing the Department with documentary evidence of disadvantaged status: "The district documents a school attendance area for economic and environmental disadvantagement on the basis of a substantial number of socio-economic factors," p. 9. (R46)

i. the $200 grant factor: "the product of the number of disadvantaged pupils in that jurisdiction (as defined in Section B above) times $200, annually." p. 9. (R10)

j. "non-school personnel may submit proposals to school boards," p. 3. (R28)

k. resident pupils: ". . . that resident pupils only are to be included in calculating the equalized assessment per pupil", p. 8. (R37)

R2: THE FEATURES OF THE GUIDELINES WHICH HAVE CAUSED PROBLEMS UNDER OPERATING CONDITIONS IN THE MAJORITY OF DISTRICTS SURVEYED SHOULD BE REVIEWED BY THE DEPARTMENT AND REVISED AS RECOMMENDED IN SECTION VIII, PART C.

C5: Not all features of the policy guidelines caused problems.

Discussion

The following is a list of features of the policy guidelines which generally have not caused serious problems under operating conditions. These guidelines are acceptable in their present form. Recommendations for improvement generally suggest modifications in procedures used to operationalize them.

a. funding based on written proposals: "Funding ('Department approved proposal') required to qualify," p. 3. (R12, R13, R14, R15, R16)

b. the evaluation requirement: "How will the program and its impact on students be evaluated?" p. 22. & p. 14-17. (R4, R5)

c. integrated projects: "Integrated projects encompassing both Elementary Education and Compensatory Education (as well as other areas, such as Early Childhood Services) are seen as operationally sound locally . . .," p. 3. (R7)

d. project grants: "outright project grants, not per pupil," p. 2. (R23)

e. the scope of the fund: "grades one to twelve inclusive," p. 1. (R8, R9)

f. funding level determined by need: "payment determined by nature, size and scope of project," p. 3. (R23)

g. selection of pupils on the basis of educational data: "Pupils who are educationally disadvantaged in categories other than those funded under the Special Educational Services Branch," p. 9. (R47)

h. excludes other handicaps: (Excludes physically, emotionally or mentally handicapped)," p. 2. (R20)

i. emphasis on intensifying human resources: "Emphasis is on delivery of human educational services which are of direct assistance to the teacher and the learner at the classroom level," p. 2. (R18, R19)

j. "funding coordination: Department of Education and the Department of Indian Affairs," p. 12. (R34)

k. will not provide funds for planning and administration: "WILL NOT FUND: (a) positions which have as their major emphasis planning, administrative, coordinative, or organizational activity," p. 4. (R17)

l. proposal status categorization: "conditional approval" p. 6. (R21, R22)

m. existing expenditures: ". . . but, WILL NOT FUND existing expenditures of school boards . . . ," p. 4. (R29, R30)

R3: A NEW POLICY MANUAL SHOULD BE PREPARED. IT SHOULD BE WRITTEN IN CLEAR, PRECISE LANGUAGE WHICH CAN EASILY BE UNDERSTOOD BY BUSY TEACHERS AND ADMINISTRATORS, DIRECTLY OR INDIRECTLY INVOLVED WITH EOF (COMPENSATORY).

C. Program Implementation

C6: There is strong support for the government's insistence on program evaluation.

Discussion

While there is strong support for the evaluation requirement and project personnel have put forth a substantial effort to do the best job possible, the limitations imposed on them have made it difficult for many to do high quality work. The limitations include lack of human resources, lack of financial support, lack of trained program evaluators, lack of experience in evaluation and lack of consultative assistance for evaluation.

R4: THE EOF STAFF SHOULD ENCOURAGE PROJECT PERSONNEL TO INCREASE THEIR BUDGETS FOR EVALUATION IN PROJECT PROPOSALS SO THAT A COMPREHENSIVE EVALUATION CAN BE CARRIED OUT.

R5: THE EOF STAFF SHOULD ENCOURAGE RURAL PROJECT STAFFS TO REQUEST MORE CONSULTATIVE ASSISTANCE FOR IMPLEMENTATION, PROGRESS AND OUTCOME EVALUATION FROM REGIONAL OFFICE CONSULTANTS.

Discussion

Implementation, progress and outcome evaluation are defined in the Policy Manual, p. 15.

C7: Parental support and involvement are desirable components of all compensatory education projects.

R6: THE EOF STAFF SHOULD CONTINUE THE PRACTICE OF ENCOURAGING LOCAL SCHOOL DISTRICTS TO DOCUMENT EVIDENCE OF COMMITMENT TO PARENTAL SUPPORT AND INVOLVEMENT IN THE WRITTEN PROPOSAL

DOCUMENT, BUT SUCH EVIDENCE SHOULD NOT BE A MANDATORY REQUIREMENT FOR FINANCIAL SUPPORT.

Discussion

If the submission of documentary evidence of parental support and involvement is made a required condition of funding, the commitment demonstrated in project proposals might not be genuine. Furthermore, parental support for and involvement in projects is often particularly difficult to obtain in a 'disadvantaged' area, therefore, by making eligibility for funding dependent upon this type of commitment, funds could be denied to those areas most in need of them.

C8: There is strong support for the feature of the policy guidelines which encourages integration of projects, for instructional purposes, when funds come to a board from several different sources, e.g., EOF (Compensatory), EOF (Elementary), LDF, etc.

R7: THE DEPARTMENT SHOULD CONTINUE TO ENCOURAGE AN INTEGRATED APPROACH TO LEARNING PROBLEMS AT THE INSTRUCTIONAL LEVEL.

Discussion

An integrated approach at the instructional level combines funds from several different categories of support in order to provide a single set of learning activities aimed at the total needs of the child.

C9: There is strong support for the grade one to twelve emphasis in the compensatory component of EOF.

R8: THE GRADE ONE TO TWELVE EMPHASIS IN THE COMPENSATORY COMPONENT OF EOF SHOULD BE RETAINED.

Discussion

The scope of the compensatory fund, encompassing all grade levels from one to twelve, should be retained primarily for the flexibility it affords at the local level. While this flexibility is desirable, it would not be wise to spread funds thinly over a large number of pupils.

R9: THE EOF STAFF SHOULD URGE PROJECT PERSONNEL TO CONCENTRATE AVAILABLE FUNDS ON PUPILS DEMONSTRATING GREATEST NEED.

Discussion

Evidence from the United States indicates that where funds have been spread too thinly, little has been accomplished with their expenditure.

R10: THE GOVERNMENT SHOULD EXAMINE THE SUITABILITY OF THE PRESENT PER-PUPIL GRANT FACTOR.

Discussion

The present per-pupil grant factor for compensatory education is $200.00. (Policy Manual, p. 9)* Title I Directors in forty-nine states were surveyed to determine the per-pupil grant factor which, in their opinion, represented a sufficiently concentrated effort to provide reasonable promise of success in compensatory education. It is their opinion that evidence is not available to substantiate a specific dollar figure, however, there appears to be general consensus that successful programs are funded anywhere from $200 per-pupil and up.** Title I Directors in the United States suggest that $200 per-pupil is low, and above $500 per-pupil raises questions of cost-benefit and excessive spending. As a rule of thumb, some suggest concentrating fiscal effort for compensatory education at about one-half of the local average per-pupil expenditure for regular programming. Pennsylvania reported expenditures of $234 per-pupil and California, $350. Nebraska provided the following table to illustrate that gains appeared somewhat higher for concentrated fiscal efforts.

Federal $ Per-Pupil Costs	Mean Gains
$150 - $250	.99
$250 - $350	1.01
$350 - $500	1.03
$500 or more	1.18

In a study released in June, 1974, the Rand Corporation reported:

> It would appear that incremental per-pupil costs of successful educational intervention vary anywhere from $200 on up, with the "feasible range" for such programs falling between $250 and $350. However, numerous interventions funded at these levels have failed. Clearly the level of funding is not itself a sufficient condition for success.[11]

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* "The ultimate ceiling for a jurisdiction having an equalized assessment per-pupil of less than $4,000.00; the product of the number of disadvantaged pupils in that jurisdiction (as defined in Section B above) times $200, annually." This criterion does not apply to the four large urban centers. See Policy Manual, 1974, p. 10.

** The services provided to children under Title I are to be above and beyond those normally available to all other children in the school district, therefore, per-pupil expenditure figures represent funds which are available above and beyond all other revenue sources. Compensatory funds are specifically earmarked to meet those educational needs of disadvantaged students which cannot be met through regular funding sources.

Contempory practice in compensatory education would seem to indicate that the present per-pupil grant factor of $200 is low, however, careful planning and evaluation will improve cost-effectiveness and reduce the need to spend large amounts.

> R11: THE GOVERNMENT SHOULD MAKE APPROPRIATIONS UNDER EOF (COMPENSATORY) EQUAL TO THE PRODUCT OF THE NUMBER OF PUPILS IN THE PROVINCE NEEDING COMPENSATORY ASSISTANCE AND AN ACCEPTABLE PER-PUPIL GRANT FACTOR.

Discussion

The Department should determine the number of pupils in the province in need of compensatory education by implementing recommendation 42 (identification of project areas) and recommendation 47 (identification of pupils residing in project areas on the basis of school performance).

> C10: There is strong support for funding compensatory education on the basis of Department approved written proposals.

Discussion

The majority of the superintendents, deputy and assistant superintendents, project supervisors and school board members in participating districts strongly supported project grant funding. The majority were extremely cautious about expressing opinions in favour of formula funding claiming that the desirability of such a funding mechanism would depend on the formula. There is a general feeling that a combination of project funding and formula funding might be desirable but, again, the merit of such a combination would depend largely on the nature of the formula devised.

> R12: FUNDING COMPENSATORY EDUCATION ON THE BASIS OF DEPARTMENT APPROVED WRITTEN PROPOSALS SHOULD CONTINUE.

Discussion

The compensatory component was implemented before the policy guidelines were clearly defined. Planning problems arose during the early implementation stages as a direct result of the definitional problem. Many of the problems associated with the written proposal requirement, expressed by project personnel, can be attributed to the difficulties which the Department experienced implementing the program. A simple set of guidelines written in precise language which clearly communicate the Department's expectations should avoid repeating some of the same experiences.

Project personnel have made a number of suggestions for improving the procedures for accessing compensatory funds. Their suggestions are found in the amplified version of this report. Examples of the type of suggestions made include:

1. Simplify the written proposal requirement.
2. Eliminate competition for funds.
3. Provide financial assistance to small jurisdictions not having the human and technical resources to prepare proposals.
4. For discussion purposes, during the initial planning stage, provide a standard blank form with space to fill in the required information.
5. Encourage face-to-face meetings between project planners and the EOF staff to discuss initially proposed plans.
6. Before expecting extensive and elaborately written proposals, the Department should, first of all, give approval in principle to a project idea.

Many of the recommendations proposed by project personnel reflect inadequacies of the early versions in the policy guidelines and efforts to translate these guidelines into operational terms. Therefore, some of the suggestions put forth by project personnel do not apply as the Department has since taken corrective action. Some of the ideas proposed by project personnel which the evaluators endorse and which represent improvements over the current situation are included in the following recommendations.

R13: ALL COMMUNICATION RELATED TO THE FORMAL APPROVAL OF PROPOSALS SHOULD BE IN WRITING, BUT WHERE DEEMED MUTUALLY DESIRABLE BY THE EOF STAFF AND DISTRICT PERSONNEL, FACE-TO-FACE MEETINGS SHOULD BE HELD TO DISCUSS WRITTEN DOCUMENTS.

R14: WHEN A DISTRICT HAS A PROJECT IDEA TO PROPOSE, THE FIRST DOCUMENT SUBMITTED SHOULD BE A PROSPECTUS. THE PROSPECTUS SHOULD DESCRIBE IN DETAIL THE CHIEF FEATURES OF THE PROPOSED FORTHCOMING PROPOSAL. IF THE IDEA PRESENTED IN THE BRIEF IS CONSIDERED PROMISING BY EOF STAFF, THE DEPARTMENT SHOULD THEN REQUEST A PROPOSAL.

R15: THE DEPARTMENT SHOULD RETAIN ALL CURRENT PROCEDURES PERTAINING TO PROPOSAL REVIEW AND APPROVAL.

R16: IF A DISTRICT CAN DEMONSTRATE THROUGH DOCUMENTATION THAT IT LACKS THE NECESSARY HUMAN RESOURCES FOR NEEDS ASSESSMENT, PLANNING AND PROPOSAL PREPARATION, THE DEPARTMENT SHOULD PROVIDE 'FRONT-END' MONEY FOR THESE PROCESSES.

Discussion

Because of the nature and scope of problems addressed in compensatory education, proposals cannot be simple. They must be based on a thorough needs assessment and be well planned. For this reason, communication between the Department and district personnel must begin very early in the project development process (it is assumed that the guidelines will be clear and that district personnel will not waste time submitting potentially ineligible proposals). District personnel should not be allowed to waste valuable human and material resources developing extensive and elaborate documents which have no hope of being approved.

C11: The government's refusal to fund personnel ". . . positions which have as their major emphasis planning, administrative, coordinative, or organizational activity . . ." was strongly rejected by the majority of persons surveyed.

R17: IF A DISTRICT CAN DEMONSTRATE THROUGH DOCUMENTATION THAT PLANNING, ADMINISTRATION, COORDINATIVE OR ORGANIZATIONAL ACTIVITIES FOR COMPENSATORY EDUCATION, PLACE INORDINATE DEMANDS ON JURISDICTIONAL PERSONNEL, THE GOVERNMENT SHOULD MAKE FUNDS AVAILABLE FOR SUCH POSITIONS.

C12: There is strong support for the emphasis on intensifying the human resource component at the classroom level.

Discussion

Material resources are also important, however, and policy guidelines should be flexibile enough to accommodate requests for such resources.

R18: THE DEPARTMENT SHOULD CONTINUE TO ENCOURAGE LOCAL SCHOOL DISTRICTS TO ATTEMPT TO ALLEVIATE LEARNING DEFICITS OF TARGET CHILDREN BY INTENSIFYING THE HUMAN RESOURCE COMPONENT AT THE CLASSROOM LEVEL.

Discussion

Delivering human resources at the classroom level should remain the emphasis of EOF (Compensatory). However, because the desirable split between human and material resources is often determined by the nature of the project, the Department could perhaps allow flexibility in determining this split.

R19: IF A DISTRICT CAN DEMONSTRATE NEED FOR MATERIAL RESOURCE SUPPORT AS PART OF THE PROJECT PROPOSAL, THE DEPARTMENT SHOULD BE PREPARED TO RESPOND TO SUCH REQUESTS.

C13: There is generally strong support for excluding the physically, emotionally and mentally handicapped from programs funded by EOF (Compensatory).

Discussion

As long as children with these handicaps are provided with adequate programs from other funding sources, it is fair to exclude them from compensatory funding.

R20: THE DEPARTMENT SHOULD CONTINUE THE PRACTICE OF NOT USING COMPENSATORY FUNDS TO PROVIDE PROGRAMS FOR CHILDREN ". . . WHOSE PRIMARY HANDICAP IS PHYSICAL, MENTAL, EMOTIONAL, OR SENSORY . . ."

C14: The majority of respondents surveyed reported that the conditional approval category caused confusion.

Discussion

The confusion about the conditional approval status assigned to some proposals appeared to arise from the Department's failure to communicate its expectations about the conditions applied and its failure to communicate the assurance to local project personnel that funds were guaranteed if conditions were met. Difficulties with the conditional approval category can be attributed to the lack of clear definition in the policy guidelines during the early implementation phase. The Department's expectations are clearly made known in the Policy Manual, 1974, page 6.

R21: PROJECT STAFFS MUST BE INFORMED, IN WRITING, OF THE CONDITIONS APPLIED TO A PROPOSAL.

R22: WHEN DEEMED MUTUALLY DESIRABLE BY THE EOF STAFF AND DISTRICT PERSONNEL, A FACE-TO-FACE MEETING SHOULD BE HELD TO DISCUSS THE LETTER IN WHICH THE WRITTEN CONDITIONS ARE OUTLINED.

Discussion

District personnel must know exactly where they stand when conditions are imposed. A face-to-face meeting at this stage might help clarify written conditions.

C15: There is strong support for funding compensatory education projects in proportion to their nature, size and scope.

Discussion

Project funding is more stable than funding based on pupil enrollments as the amount does not change with fluctuations in the student population. It also allows more flexibility in targeting funds to areas of greatest need.

R23: THE DEPARTMENT SHOULD CONTINUE TO FUND COMPENSATORY EDUCATION PROJECTS IN PROPORTION TO THEIR NATURE, SIZE AND SCOPE.

C16: There is strong support for longer term projects of three to six years.

Discussion

A longer project term adds stability to local efforts and allows for better long-range planning. Furthermore, it takes time to achieve goals in compensatory education, and results obtained at the end of a longer term would give a better indication of project success. Due to the nature of compensatory problems, longer term projects are needed if aims are to be realized.

R24: THE GOVERNMENT SHOULD MOVE COMPENSATORY EDUCATION FROM A THREE YEAR PROJECT CYCLE INTO A FIVE YEAR CYCLE.

R25: THE NEW FIVE YEAR CYCLE SHOULD BEGIN SEPTEMBER 1, 1977.

R26: THE PERIOD FROM SEPTEMBER 1, 1976 TO JUNE 30, 1977 SHOULD BE DEVOTED TO NEEDS ASSESSMENT, PLANNING AND PROPOSAL PREPARATION FOR NEW FIVE YEAR PROJECTS.

C17: There was no strong support for either comprehensive system-wide proposals or individual school or classroom level proposals.

Discussion

There are personal preferences for one type or the other throughout the province, but no clear majority sided with either one. Advantages were cited on both sides.

R27: THE DEPARTMENT SHOULD CONTINUE TO GIVE LOCAL DISTRICTS THE OPTION OF SUBMITTING SEVERAL SCHOOL LEVEL PROPOSALS, ONE SYSTEM LEVEL PROPOSAL OR A COMBINATION OF BOTH.

C18: The Department's expectations about the feature of the policy guidelines which states, ". . . school and non-school personnel may submit proposals to school boards . . ." was not well understood by the majority of respondents surveyed.

R28: THIS FEATURE OF THE GUIDELINES WHICH STATES ". . .SCHOOLS AND NON-SCHOOL PERSONNEL MAY SUBMIT PROPOSALS TO SCHOOL BOARDS . . ." SHOULD BE CLARIFIED.

C19: There is only moderate support for the government's refusal to fund existing expenditures of school boards.

R29: THE GOVERNMENT SHOULD RETAIN A GENERAL POLICY OF NOT FUNDING EXISTING EXPENDITURES OF SCHOOL BOARDS THROUGH EOF (COMPENSATORY).

R30: THE GOVERNMENT SHOULD GIVE SPECIAL CONSIDERATION TO FUNDING EXISTING EXPENDITURES OF SCHOOL BOARDS IN SITUATIONS WHERE THOSE EXPENSES ARISE FROM COMPENSATORY EDUCATION PROJECTS

ALREADY IN OPERATION, WHICH HAVE OBJECTIVES COMPATIBLE WITH PROVINCIAL COMPENSATORY PROGRAM GOALS.

C20: There is a general feeling that it is unrealistic to expect financial support from other local organizations and individuals in a "disadvantaged" area.

Discussion

While this support may be desirable and, in some cases, possible the Department should not make access to the Fund dependent upon a district's ability to obtain this support. Non-financial support from these areas would be a more realistic expectation.

R31: THE DEPARTMENT SHOULD CLARIFY ITS EXPECTATIONS CONCERNING THE GUIDELINE, "FINANCIAL AND NON-FINANCIAL SUPPORT OF OTHER LOCAL ORGANIZATIONS AND INDIVIDUALS IS VIEWED AS EVIDENCE OF LOCAL INVOLVEMENT AND COMMITMENT."

C21: The majority of respondents surveyed reported that service and cooperation from the Regional Office staffs has been satisfactory or better, particularly in the area of project planning.

Discussion

While there is general satisfaction about the consultative services provided by Regional Office staffs in relation to needs assessment, project planning and proposal preparation, personnel at some project sites expressed dissatisfaction about the service provided for the evaluation of EOF projects. It is the opinion of the evaluators that when complaints were voiced, unrealistic expectations were held of ROE personnel. These expectations appear to have been created by a statement in the Policy Manual which says, "Regional Office personnel, if and when involved in evaluation, may, to meet minimal evaluation requirements, carry out pre- and post-assessment activities," p. 5. Considering the resource constraints, it is unrealistic to expect Regional Office personnel to carry out the type of evaluation implied in this statement. However, "informal monitoring of EOF projects" is a reasonable expectation.

R32: REGIONAL OFFICE STAFFS SHOULD NOT BE EXPECTED TO ASSUME FULL RESPONSIBILITY FOR THE EVALUATION OF PROJECTS.

R33: REGIONAL OFFICE STAFFS SHOULD BE EXPECTED TO PROVIDE CONSULTATIVE SERVICE TO IMPROVE ALL PHASES OF THE EVALUATION WORK CARRIED OUT BY PROJECT STAFFS.

Discussion

The phases referred to in this recommendation are defined in the Policy Manual, 1974, page 15. They include needs assessment, program planning, implementation process evaluation, program process evaluation and outcome evaluation.

Discussion

By optimizing the operation of each of these evaluative processes at each project site, much less emphasis would be required on the ROE monitoring function.

C22: The coordination of funding with the Department of Indian Affairs is a feature of the guidelines that was well received by the majority surveyed.

R34: THE FEATURE OF THE GUIDELINES WHICH ENCOURAGES SHARED FUNDING OF PROJECTS BETWEEN THE DEPARTMENT OF INDIAN AFFAIRS AND THE DEPARTMENT OF EDUCATION SHOULD CONTINUE.

C23: There is widespread concern amongst the smaller school systems that they are at a disadvantage when having to compete with larger school systems for scarce compensatory funds.

Discussion

Project personnel in small school systems claim that they do not have the human or technical resources necessary to prepare proposals which can compete with larger school systems. The Department should respond to requests for 'front-end' money to permit small school systems to acquire the necessary human resources for proposal preparation as provided for under Recommendation 16. Project personnel should be encouraged to use local people to develop proposals. Outsiders, unfamiliar with the unique problems of disadvantaged areas, are less desirable.

R35: THE REGIONAL OFFICES OF EDUCATION SHOULD PROVIDE THE NECESSARY TECHNICAL ASSISTANCE FOR NEEDS ASSESSMENT, PLANNING AND PROPOSAL WRITING WHICH SMALLER SCHOOL SYSTEMS MAY NEED TO PLACE THEM ON AN EQUAL FOOTING WHEN IN COMPETITION WITH LARGER SCHOOL SYSTEMS.

C24: The respondent groups generally felt that it was reasonable to direct funds to those jurisdictions experiencing the greatest degree of financial hardship.

Discussion

The groups surveyed generally supported the policy of the government outlined in the Policy Manual, 1974, which calls for attempting to equalize districts with respect to their ". . . financial capability to mount the extended educational programming effort necessary for Compensatory Education . . . ," p. 8. While this is a desirable goal and one which the government should strive to attain, it should not be attained using funds appropriated for compensatory education. Other funds available to districts, apart from those available through EOF (Compensatory), should be used to equalize districts with respect to their financial capability to provide educational services. The government should not use the Fund to compensate districts experiencing financial hardship unless those hardships are caused by expenses accruing from compensatory education projects already in operation, which have objectives compatible with provincial compensatory education program goals.

R36: THE DEPARTMENT SHOULD NOT USE COMPENSATORY FUNDS TO EQUALIZE THE FINANCIAL CAPABILITY OF DISTRICTS TO MOUNT THE EXTENDED EDUCATION PROGRAMMING EFFORT NECESSARY FOR COMPENSATORY EDUCATION.

R37: THE DEPARTMENT SHOULD DISCONTINUE USING EQUALIZED ASSESSMENT PER PUPIL AS THE INITIAL ECONOMIC CRITERION OF ELIGIBILITY FOR COMPENSATORY FUNDING.

Discussion

The wealth of a district, in terms of its ability to fund education, should not be a criterion of need for compensatory funding. Revenues available to districts from other sources, apart from EOF (Compensatory), should be used to equalize the ". . . economic capability of two jurisdictions to finance extended educational programming . . ." p. 8. Assuming that revenues available from other sources make two districts equal with respect to their economic capability to finance extended educational programming, the compensatory funds should go to the district having the highest concentrations of culturally, socially or environmentally disadvantaged students.

R38: THE COMPENSATORY FUND SHOULD BE USED TO ". . . PROVIDE THE EXTRA ASSISTANCE AT THE CLASSROOM LEVEL THAT CULTURALLY, SOCIALLY OR ENVIRONMENTALLY DISADVANTAGED STUDENTS MAY NEED TO AIM AT BEING ON AN EQUAL FOOTING WITH OTHER STUDENTS." POLICY MANUAL, PAGE 3.

R39: THE DEPARTMENT SHOULD DIRECT COMPENSATORY FUNDS TO THOSE SCHOOL ATTENDANCE AREAS OF THE PROVINCE WHICH CONTAIN WITHIN THEIR BOUNDARIES HIGH CONCENTRATIONS OF CHILDREN FROM CULTURALLY, SOCIALLY, OR ENVIRONMENTALLY DISADVANTAGED FAMILIES.

C25: The Department failed to provide clear guidelines for identifying the ". . . culturally, socially or environmentally disadvantaged students . . ." in 1973.

Discussion

It is important to make a distinction between two levels in the problem of identifying the target population:

(1) Which geographic areas of the province contain high concentrations of culturally, socially or environmentally disadvantaged families?;

(2) How should individual students residing within those geographic areas be selected for participation in compensatory education programs?

Compensatory education is designed to optimize learning potential for children who reside in culturally, socially or environmentally disadvantaged areas of the province. Geographic definition is fundamental to the concept of compensatory education.

R40: THE DEPARTMENT SHOULD RETAIN THE POLICY OF HAVING DISTRICTS DOCUMENT A SCHOOL ATTENDANCE AREA FOR ENVIRONMENTAL DISADVANTAGEMENT ON THE BASIS OF A SUBSTANTIAL NUMBER OF SOCIO-ECONOMIC FACTORS.

Discussion

It is suggested that the term project area be used to represent one or more school attendance areas having high concentrations of culturally, socially or environmentally disadvantaged families.

School systems unable to define project areas on the basis of criteria provided by the Department, should be considered to have no need for compensatory education. In some instances entire school systems might be defined as project areas.

Compensatory funds should be used to provide extra assistance at the classroom level for children residing in each project area. It is recognized that many children residing outside a project area might also require extra assistance.

R41: IF CHILDREN RESIDING OUTSIDE A DEFINED PROJECT AREA REQUIRE EXTRA ASSISTANCE AT THE CLASSROOM LEVEL, LOCAL SCHOOL SYSTEMS SHOULD PROVIDE SUCH ASSISTANCE THROUGH REGULAR FUNDING SOURCES OR OTHER FUNDING SOURCES SUCH AS EOF (ELEMENTARY).

C26: Problems were encountered with the feature of the guidelines which required a district to document ". . . a school attendance area for economic and environmental disadvantagement on the basis of a substantial number of socio-economic factors . . ." p. 9.

Discussion

There were generally strong opposition to the feature of the policy guidelines which required local district personnel to provide the Department with documentary evidence of disadvantaged status.

C27: The problems associated with the feature of the guidelines which required districts to provide documentary evidence of disadvantaged status may be attributed to, (1) lack of appropriate clearly defined operational guidelines, and (2) lack of human resources to carry out the task.

R42: THE DEPARTMENT SHOULD PROVIDE CLEAR OPERATIONAL GUIDELINES TO PERMIT DISTRICTS TO DOCUMENT ". . . A SCHOOL ATTENDANCE AREA FOR ECONOMIC AND ENVIRONMENTAL DISADVANTAGEMENT ON THE BASIS OF A SUBSTANTIAL NUMBER OF SOCIO-ECONOMIC FACTORS . . .", p. 9.

R43: OPERATIONAL GUIDELINES SHOULD OUTLINE A SIMPLE DOCUMENTATION PROCESS: ONE THAT DOES NOT PLACE A HEAVY DRAIN ON LOCAL RESOURCES.

R44: IF A DISTRICT CAN DEMONSTRATE THROUGH DOCUMENTATION THAT IT LACKS THE NECESSARY FINANCIAL, HUMAN, MATERIAL OR TECHNICAL RESOURCES TO CARRY OUT THE REQUIRED PROCEDURES, THE DEPARTMENT SHOULD MAKE THE NECESSARY RESOURCES AVAILABLE.

R45: THE DEPARTMENT SHOULD PROVIDE CLEAR OPERATIONAL DEFINITIONS OF THE VARIABLES USED TO MEASURE EACH OF THE THREE ENVIRONMENTAL FACTORS LISTED ON PAGE 11 OF THE *POLICY MANUAL.*

Discussion

Under social factors, the *Policy Manual* lists "low level of education of parents" and "one parent families" as variables of social disadvantagement. Without having comparative data at the school district level on the average education level of parents across the province or the district, it is difficult for local districts to establish the exact point at which the education level of parents would be considered low. What *is* a low level of education of parents? Is it two or more grade levels below the average level of education of parents in the province? Similar problems exist with "one parent families." Does this mean ten per cent more one parent families than the provincial norm, twenty per cent, or what?

Under economic factors, the guidelines state that low income is a variable relating to disadvantagement, but what is low income? Does low income mean that thirty per cent of the families living in a school attendance area receive social assistance? Does it mean that forty per cent of the families have incomes of less than the average for Western Canada based on 1974 census data? Equal difficulty is encountered with a nebulous guideline such as "greatly substandard housing". How is this to be measured?

Under cultural factors, the Department lists the variable, "ethnic groups with greatly different culture and life style." How different from the norm is this to be? How are differences in culture and life style to be measured?

Planning problems arose during the early implementation of EOF (Compensatory) because the Department failed to provide operational definitions of the variables used to measure social, economic and cultural factors of disadvantagement.

R46: A COMPREHENSIVE RESEARCH AND DEVELOPMENT EFFORT SHOULD BE MOUNTED TO ADDRESS THE DEFINITIONAL PROBLEM IN THE COMPENSATORY COMPONENT OF THE EDUCATIONAL OPPORTUNITIES FUND

Discussion

The above recommendation is based on the premise that the definitional problem experienced by the Department during the early implementation of EOF (Compensatory) has not been completely solved. Progress was made by identifying three important environmental factors to consider when determining disadvantagement: social, economic and cultural. Progress was also made by identifying variables to use in measuring each of these factors: social factors, low level of education of parents; economic factors, low income; cultural factors, language of the home other than English or French. The part of the problem that remains unsolved relates to providing operational definitions of the variables used to measure each of the three factors.

A research and development effort should search for one or two variables which can be operationally defined and which stand proxy for several other possible variables.

Examples:

(1) Factor: Social
Variable: One-parent homes
Operational Definition: At least thirty per cent of the children residing in a school attendance area are from one-parent homes.

(2) Factor: Economic
Variable: Property Assessment
Operational Definition: Equalized assessment per pupil is less than $4,000.00 for the school attendance area.

(3) Factor: Cultural
Variable: Language of the Home.
Operational Definition: At least thirty per cent of the children residing in the school attendance area come from families where the language of the home is other than English.

A research and development effort should:

(1) Identify and evaluate all possible alternative variables which might be used to measure each of the three factors.

(2) Select one or two variables for each of the three factors which represent the best proxy.

(3) Operationally define each variable selected.

C26: There was generally strong support for the identification and selection of students for participation in compensatory education projects on the basis of educational data.

R47: THE DEPARTMENT SHOULD PROVIDE SCHOOL SYSTEMS WITH CLEAR GUIDELINES THAT WOULD ENABLE THEM TO IDENTIFY AND SELECT STUDENTS (RESIDING IN DEFINED PROJECT AREAS) ON THE BASIS OF SCHOOL PERFORMANCE.

Discussion

The guidelines should take cognizance of cognitive, affective and psychomotor variables. The criteria for selection should be pupil need.

D. Program Results

The following conclusions are based on the opinions of school superintendents, deputy and assistant superintendents, project supervisors and school board chairmen in all jurisdictions operating compensatory education projects:

C28: Compensatory education has enabled districts to use new and unique ways of teaching the skill subjects of reading and mathematics.

C29: There is fairly strong evidence to suggest that EOF (Compensatory) has improved student attitudes and motivation.

C30: There is fairly strong evidence to suggest that EOF (Compensatory) has increased the level of self-confidence and self-respect of 'disadvantaged' students.

C31: Community reaction to EOF (Compensatory) is favourable.

C32: There have been improvements in instructional skills and knowledge since EOF (Compensatory) was introduced.

C33: There is fairly strong evidence to suggest that EOF (Compensatory) has increased the student level of mastery in reading, mathematics and language.

Data presented in local project evaluation reports, based on cognitive and attitude measures, revealed that EOF (Compensatory) has:

C34: Improved the performance of target children in the basic skill areas of reading, language and mathematics.

C35: Provided no appreciable improvement in student attitudes.

It also appears that EOF (Compensatory) has strong support from the various groups surveyed by local project evaluators:

C36: Students have reported developing interests in reading which were non-existent prior to the program.

C37: Parents reported that their children are happier, that they have improved attitudes toward school, that they take a greater interest in matters relating to school work and that generally school performance has improved.

C38: Teachers are pleased with the opportunity to use new materials which provide more stimulating learning experiences for their students and are pleased that their efforts are being rewarded with improved student performance.

R48: THE DEPARTMENT SHOULD CONTINUE EOF (COMPENSATORY) FUNDING UNTIL JUNE 30, 1982.

R49: THE DEPARTMENT SHOULD ACCEPT NEW APPLICATIONS FOR FIVE YEAR PROJECTS WHICH WOULD BEGIN ON SEPTEMBER 1, 1977.

R50: THE DEPARTMENT SHOULD BUILD SOUND EVALUATION COMPONENTS INTO ALL FUTURE PROJECTS SO THAT MORE DEFINITIVE CONCLUSIONS ABOUT THE BENEFITS OF COMPENSATORY EDUCATION CAN BE MADE IN 1982.

R51: THE DEPARTMENT SHOULD SELECT A SAMPLE OF PROJECTS FOR THOROUGH EXTERNAL EVALUATION.

Discussion

Based upon all the evidence provided by this study, it appears that the initial three-year experimental compensatory education effort in the province of Alberta has been a success. The data collected and analysed has been extensive and all indications are that positive results have been produced in participating districts. Because of a lack of intensive student performance data (experimentally derived data), however, these results must be regarded merely as a promising beginning. Definitive conclusions about student performance can only be obtained through controlled experimentation.

FOOTNOTES FOR SECTION 1

[1] Maurice Chazan, Compensatory Education, (London: Butterworth, 1973).

[2] Report of the Minister's Advisory Committee on School Finance (Alberta Department of Education Archives, Edmonton), June 1972.

[3] Michael Doyle, "Compensatory Education for the Disadvantaged in Elementary and Pre-School Grades," Education, Volume No. 90, (November, 1969), pp. 176-77.

[4] James F. Winschel, "In the Dark . . . Reflections on Compensatory Education 1960-1970," The Disadvantaged Child, ed. Hellmuth, Volume III, (New York: Brunner/Mazel, 1973).

[5] Daniel B. Taylor, "Summary of ESEA Title I in West Virginia," (Bureau of Services and Federal Programs, Charleston, West Virginia), March, 1975.

[6] Stated by J. Collins Meek, Personal Interview, May 3, 1974.

[7] Opinion expressed by Louis Hyndman in an address ("A Talk with the Minister") at Red Deer (Alberta), March 25-28, 1974.

[8] The Calgary Albertan, Final Edition, February 6, 1976, Sec. II p. 11.

[9] Walter Worth, A Choice of Futures, Report of the Commission on Educational Planning, (Edmonton: Queen's Printer for the Province of Alberta), 1972.

[10] Opinion expressed by E.P. Sloan in an address at the Eighth Annual Canadian Conference on Education Research ("The Canada New Start Program") at Ottawa (Ontario), March, 1970.

[11] Harvey A. Averch and others, How Effective Is Schooling?; (Englewood Cliffs: Educational Technology Publications, 1974), p. 143.

SECTION II

FISCAL DATA

In the program period September 1, 1973 to June 30, 1976, twenty-one jurisdictions operating approved compensatory projects received EOF appropriations totalling $3,340,297.00. Data compiled in Table 3 reveal that the majority of the funds were directed to jurisdictions in the north.[1] Excluding the two largest urban centres, more than ninety-nine per cent of the funds were allocated to districts north of Highway 16. Rocky Mountain Division No. 15 and Taber Division No. 6, with one small project each, were the two exceptions in the south. Twenty-one per cent of the total appropriations went to the two largest urban centres of Edmonton and Calgary. No compensatory projects were funded in the other two large urban centres of Lethbridge and Medicine Hat.

The rural districts receiving the largest portion of the funds were, respectively, High Prairie School Division No. 48, Northland School Division No. 61, and Fort Vermilion School Division No. 52. These districts received thirty-eight per cent of the total compensatory allocations. Twelve of the twenty-one districts received appropriations in excess of one-hundred thousand dollars.

Both school level and comprehensive system level proposals were approved by the Department of Education. Of the forty-five projects approved, twelve were located in Calgary School District No. 19. Thirteen of the districts had only one project, but these ranged in size from $6,098.00 to $424,850.00.

The figures reported in Table 4 indicate that thirty-six school jurisdictions within the province were eligible to receive EOF (Compensatory) funds based upon an equalized assessment per pupil of less than four thousand dollars.[2] The districts in this category were eligible only in the sense of being limited economically in their capacity to mount extended programming of a compensatory nature. While these districts were eligible on the basis of economic criteria, some of them might not have been able to demonstrate a significant proportion of educationally disadvantaged pupils and were disqualified on that basis. Of the thirty-six districts in the province having the lowest equalized assessment, two submitted proposals and received funds to operate projects. The remainder, twenty-six, either did not apply or were not able to provide evidence of substantial educational disadvantagement. Eleven districts (excluding the two largest urban centres) with equalized assessments of more than four thousand dollars per pupil submitted proposals and subsequently had them approved. While these districts were ineligible for funding on a jurisdiction-wide basis, they were able to provide sufficient evidence of environmental disadvantagement within selected school attendance areas to qualify for funds.

TABLE 3

LIST OF APPROVED PROJECTS - EDUCATIONAL OPPORTUNITIES FUND (COMPENSATORY)

Name of County, District or Division	Number of Projects	Total Estimated $	Duration
Athabaska County No. 12	4	$ 190,689	1973-76
**Bonnyville District No. 2665	1	53,853	1973-76
Calgary R.C.S.S.D. No. 1	2	120,510	1974-76
Calgary District No. 19	12	302,040	1973-76
Edmonton District No. 7	4	404,119	1973-76
Edmonton R.C.S.S.D. No. 7	1	122,543	1974-76
Ft. McMurray R.C.S.S.D. No. 32	2	98,500	1973-76
Ft. Vermilion Division No. 52	1	246,290	1973-76
Ft. Vermilion R.C.S.S.D. No. 26	1	58,417	1973-76
Grande Cache District No. 5258	2	16,725	1974-76
Grovedale District No. 4910	1	13,844	1973-76
High Prairie Division No. 48	3	601,724	1973-76
*Lac La Biche Division No. 51	3	152,603	1973-76
Lac Ste. Anne County No. 28	1	10,750	1974-75
McLennan R.C.S.S.D. No. 30	1	187,679	1974-76
***Northland Division No. 61	1	424,850	1974-76
Rocky Mountain Division No. 15	1	17,600	1974-76
Rosary R.C.S.S.D. No. 37	1	7,120	1974-76
**St. Paul County No. 19	1	177,375	1973-76
St. Paul District No. 1	1	126,968	1973-76
Taber Division No. 6	1	6,098	1974-76
21 Jurisdictions	45	$3,340,297	1973-76

* Special project not included in Lac La Biche

** Bonnyville Agent Board for Grande Centre RCSSD No. 67 & Cold Lake RCSSD No. 64.

** McLennan Agent Board for Spirit River RCSSD No. 36, Valleyview RCSSD No. 48 High Prairie RCSSD No. 56, Falher Cons. No. 59.

** St. Paul Agent Board for St. Paul S.D. No. 2228, Glan Avon S.D. No. 5.

*** Northland Division No. 61 Combined Elementary and Compensatory.

TABLE 4

EOF (COMPENSATORY): ELIGIBLE DISTRICTS ON BASIS OF EQUALIZED ASSESSMENT PER PUPIL

SCHOOL DIVISIONS

	SCHOOL JURISDICTIONS	EQUALIZED ASSESSMENT PER PUPIL
1)	Northland Division No. 61 (F)	$1,070
2)	Fort Vermilion Division No. 52 (F)	2,492
3)	Lac La Biche Division No. 51 (F)	2,456
4)	Bonnyville Division No. 46 et al. (Bonneyville C.S. District No. 2665 (F) Beven C.S. District No. 124, Willow Trail C.S. No. 125, Bonnyville H.S.D. No. 4)	3,420
5)	Crowsnest Pass Division No. 63	3,944
6)	High Prairie Division No. 48 (F)	3,891

CITY, TOWN, RURAL AND CONSOLIDATED SCHOOL DISTRICTS

	SCHOOL JURISDICTIONS	EQUALIZED ASSESSMENT PER PUPIL
7)	Beaverlodge C.S. District No. 68 (Hayfield C.S. No. 117, Rio Grande C.S. No. 118, N. Beaverlodge C.S. No. 119)	1,910
8)	Fort Vermilion C.S. District No. 26 (F)	1,092
9)	Theresetta C.S. District No. 23	1,918
10)	Drayton Valley C.S. District No. 111	1,114
11)	Grovedale District No. 4910 (F)	2,139
12)	Nampa C.S. District No. 96	2,463
13)	Assumption C.S. District No. 50	2,615
14)	Cold Lake C.S. District No. 64	2,372

NOTE: This list does not include some jurisdictions being accepted by the Early Childhood Services as disadvantaged, namely the school divisions Spirit River, Fairview, East Smoky and Peace River, and the County of Athabasca, St. Paul, and Lac Ste. Anne. However, where school attendance area "pockets" of disadvantagement are evident in these jurisdictions, these will be eligible for funding. As well, their general inclusion will become possible as the Compensatory budget expands in future years. The Counties of Athabaska and St. Paul are already being strongly considered for funding.

* Eligible only in the sense of being limited economically in their capacity to mount extended programming. These districts must still document a significant proportion of pupil educational disadvantagement to be funded. The Crowsnest Pass Division No. 63 is an example of an economically eligible district that may not be able to demonstrate a significant degree of educational disadvantagement.

F = Received Funds to Operate Projects.

** Information in this table is based on Addendum "B" of a memorandum from J.C. Meek, Coordinator, Educational Opportunities Fund and the Honorable L.D. Hyndman, Minister of Education, November 14, 1973.

TABLE 4 (Cont.)

SCHOOL JURISDICTIONS		EQUALIZED ASSESSMENT PER PUPIL
15)	Coaldale C.S. District No. 73 (S. Coaldale C.S. No. 74, N. Coaldale C.S. No. 75, E. Coaldale C.S. No. 76)	$2,888
16)	Valleyview C.S. District No. 84	2,417
17)	Westlock C.S. District No. 110	2,807
18)	Vermilion C.S. District No. 97	2,601
19)	St. Thomas More C.S. District No. 35	2,280
20)	Thibault C.P. District No. 35	2,857
21)	Sherwood Park C.S. No. 105 (Wye C.S. No. 116)	2,060
22)	Nordegg District No. 3211	3,444
23)	Spirit River C.S. District No. 36	3,592
24)	Sexsmith C.S. District No. 51 (Mount Star C.S. #58, Morning View C.S. No. 59, Kleskun Hill C.S. No. 61, Equity C.S. No. 62, MacHenry C.S. No. 63)	3,916
25)	Grande Centre C.S. District No. 67	3,596
26)	McLennan C.S. District No. 30 (F)	3,356
27)	Grimshaw C.S. District No. 88	3,131
28)	Rosary C.S. District #37 (F) (Mazenod C.S. No. 42, St. Monica C.S. #44)	3,166
29)	Bow Island C.S. District No. 82 (Burdett C.S. No. 83, Rosemount C.S. No. 112, Courtland Hill C.S. No. 113, Sampson C.S. No. 115, Lansdell C.S. No. 123)	3,567
30)	Lloydminster C.S. District	3,834
31)	Pincher Creek C.S. District No. 18	3,038
32)	High Prairie C.S. District No. 56	3,167
33)	Swan Hills District No. 5109	3,569
34)	Falher Con. District No. 69 (Smithreade P.S. No. 7, Aubindale C.S. No. 122)	3,966
35)	St. Albert District No. 3	3,958
36)	**Athabasca County No. 12 (F)	1,669

** Based on Information Presented to the EOF Policy Group on September 17, 1973.

FOOTNOTES FOR SECTION II

[1] Based on personal correspondence between the Administrators of the Educational Opportunities Fund and the authors, June 7, 1976.

[2] Based on Addendum "B" of a memorandum from J.C. Meek, Coordinator, Educational Opportunities Fund to the Honorable L.D. Hyndman, Minister of Education, November 14, 1973.

SECTION III

HISTORICAL SKETCH OF THE DEVELOPMENT OF EOF (COMPENSATORY) POLICY GUIDELINES

At a meeting of the In House Finance Committee of the Department of Education on December 8, 1972, it was decided to form a committee to develop guidelines for projects relative to the compensatory and elementary components of the Educational Opportunities Fund. The committee appointed consisted of J.C. Meek (Chairman), E.A. Torgunrud, H.I. Hasting, and H. Callihoe.[1] Mr. Callihoe was asked to address himself specifically to the definition of compensatory education and guidelines for the compensatory component while responsibility for the elementary component was assigned to Dr. Torgunrud.[2] Preparation of draft discussion papers began immediately and by December 27, 1972 a copy of the initial guidelines was ready for review by the entire committee.[3]

Problems with the compensatory component began to emerge early in the development of the guidelines. Reference was made in a December 1972 memorandum to a definitional problem. This problem appeared to relate to the exact target of the Fund. At that time, the Chairman of the Guidelines Committee raised the question, "Should we consider moving away from pupil identification and strive for geographical identification? Are there other alternatives?"[4]

Further elaboration and clarification of the guidelines was undertaken by the committee during January through to March of 1973. The question of definition and purpose had still not been resolved by that date. In a February 22, 1973 memorandum, the Chairman of the Guidelines Committee reiterated that the difficulties related to:

(1) identifying a set of educational programs, and

(2) identifying the pupil, or target group of pupils, for whom these educational programs are designed.

In the same memorandum, the Chairman revealed that the definitional problem had been clarified somewhat by identifying the target student as ". . . environmentally, culturally, socially or economically disadvantaged excluding the physically, emotionally or mentally handicapped child."[5] Mention was also made of the concerns of some members of the Guidelines Committee about the use of negative labels such as "disadvantaged" within the compensatory component. Some consideration was given to alternative titles for that component, but the final decision was to leave the name of the Compensatory component unchanged.[6]

On March 16, 1973 the Field Services Branch of the Department of Education announced that the position called Coordinator of the Educational Opportunities Fund was being created. Interested Field Services personnel were invited to apply. The memorandum to Field Services personnel pointed out that the incumbent would be required to develop a policy for the operation of EOF, develop and implement an accountability model, review and approve proposals from school systems, conduct developmental work in the upgrading of programs, particularly in the compensatory component, and to assume responsibility for various other activities in relation to the Educational Opportunities Fund.[7] On May 14, 1973, J.C. Meek was appointed to fill this position.

In a memorandum from the Minister to the Deputy Minister dated March 5, 1973, the question was raised about the best way to inform local boards and superintendents of the details of the forthcoming announcement concerning the Educational Opportunities Fund.[8] The administrative staff later decided to send a letter together with a copy of the guidelines document to all superintendents, board members, and Regional Office staff, and that the release of this written information would be followed by Regional Office meetings to discuss the Fund.[9]

On March 28, 1973, copies of the initial set of EOF Policy Guidelines were mailed to all school personnel and Regional Office consultants. An immediate request for further information came from many jurisdictions. In response to these requests, the Field Services Branch arranged a series of zone meetings during the period from April 6 to April 18, 1973. Mr. J.C. Meek, Chairman of the Guidelines Committee, was requested to attend these meetings to provide information about the guidelines and to answer questions from superintendents, principals, trustees and parents.[10]

Immediately following the zone meetings, proposals began to flow into the Department. By March 29, 1973 an internal Department of Education EOF Policy Group was proposed to assist the Coordinator in forming guidelines for evaluating proposals. The EOF Policy Group was to consist of the Associate Deputy Minister, the Coordinator of EOF, the Director of Field Services, the Director of Curriculum, the Director of Special Education, the Director of Early Childhood Services, and the Coordinators of the Regional Offices. The EOF Policy Group was not to undertake to review personally the individual project proposals but rather to assist the Coordinator in providing the policy framework for reviewing the individual proposals to be approved by him.[11] Proposals were evaluated using a comprehensive instrument which rated them from high to low on a five point scale according to the degree of congruency between proposed project endeavours and EOF policy guidelines.[12]

Throughout the summer of 1973 the problem of definition continued to plague the compensatory component of the Educational Opportunities Fund. By July 13, 1973, it had become clear to Mr. H.A. Callihoe that the feature of the guidelines which required local school jurisdictions to present documentary evidence of their disadvantaged status by school attendance area had serious limitations. In a memorandum to the Coordinator of EOF, Mr. Callihoe reviewed the nature of the definitial problem that he had encountered in his attempts to assist jurisdictions wishing to access compensatory funds. A brief overview of his concerns follows.

School jurisdictions were finding it next to impossible to obtain accurate data of the type requested by the Department from sources outside the school district, division or county. With the exception of a few areas such as Lesser Slave Lake and Lac La Biche, there had been few studies of the economic status of communities in the province. Problems centred around the difficulty of trying to get a measurable indicator of "disadvantagement." The Department, in its attempt to define criteria of environmental disadvantagement, requested data relative to social, cultural and economic variables. Under 'social factors: low level of education of parents, one parent families, etc.', concern was expressed by Callihoe about just what is a low level of education. Without having comparative data at the school district level on the average education level of parents across the province, it was difficult for local districts to establish the exact point at which the education level of parents would be considered low. Similar concern was expressed about "one parent families." Again, the lack of comparative data was a problem. Even if a school jurisdiction could obtain information pertaining to social factors with accuracy, what would an indication of disadvantagement be? Would it be two or more grade levels below the average level of education of parents in the province? Would it be ten per cent more one parent families than the provincial norm, twenty per cent, or what?

Similar problems were evident with economic factors. The guidelines stated that low income was a factor relating to disadvantagement, but what is low income? Social assistance was also claimed to be a factor relating to disadvantagement, but the data available from the Department of Health and Social Development encompassed too large a geographic area to be of use to the Department of Education. The level of unemployment in an area had been considered, but again there was a problem of getting reliable figures by school jurisdiction or school attendance area. Equal difficulty was expressed with nebulous guidelines such as "greatly substandard housing." How are factors such as these to be measured?, Callihoe questioned. Property value figures from the Assessment Equalization Board appeared also to be inconclusive, indicating either inaccurate information or a significant number of "squatter status" people in rural areas whose "property" was not being assessed, that is, who did not pay property tax.

Under cultural factors the Department provided the guideline, "ethnic groups with greatly different culture and life style." The three ethnic groups in Alberta with any great differences in life styles from the norm were Indian, Metis, and Hutterites and Mennonites, but only the first two groups could be considered disadvantaged in an economic sense. In the case of the latter group, the child may have a difficult time in school but his family is in all probability economically better off than the provincial norm. Mr. Callihoe concluded the memo by stating:

> Thus, since we are unable to get any solid "handles" on "disadvantaged status" of an external nature, meaning from documents

> from without the school setting, I recommend that we discontinue this exercise and ask the local school jurisdiction mainly for a good educational documentation of disadvantaged status of their pupils from their school records.[13]

In a memo from the Coordinator to the Minister of Education on July 30, 1974, reference was made to the continuing difficulties of definition and purpose in relation to the compensatory component of EOF. The memo pointed out that the fund tended . . . "to be viewed by some jurisdictions. . . as a funding source that is commensurate with need, rather than the developmental or pilot fund that it currently is."[14] By September 17, 1973, a draft paper proposing a major policy change in EOF (Compensatory) was ready for review by the Policy Group. The major revision concerned establishing economic disadvantagement as a basis for eligibility. The paper proposed that those jurisdictions whose financial capability to extend educational programming was severely limited would be considered automatically eligible for compensatory funding without further documentation of socio-economic disadvantagement. It proposed that all districts having an equalized assessment of less than four thousand dollars per pupil would be eligible for a grant of up to two hundred dollars for each educationally disadvantaged child within the district. The criteria for identifying educationally disadvantaged pupils was specified by the Department. The Department further directed that those school attendance areas within a jurisdiction having the highest proportion of educationally disadvantaged children were to be the major target for the fund. Of course, receipt of the grant was contingent upon the jurisdiction developing proposals acceptable to the Department of Education. School districts having equalized assessments greater than four thousand dollars, except for the four largest urban districts, were not automatically eligible for funding, but could qualify under the original policy guidelines which called for a school jurisdiction documenting disadvantaged status by school attendance area.[15] On November 14, 1973 a memorandum went to the Minister requesting his approval of the initial set of criteria to document economic eligibility, and the second set of criteria to demonstrate educational disadvantagement. On November 21, 1973 the Minister approved the use of these criteria for establishing eligibility for compensatory funding.[16] The final draft of the EOF Policy Manual was prepared and disseminated in early 1974.

FOOTNOTES FOR SECTION III

[1] Based on a memorandum from J.S. Hrabi, Associate Deputy Minister to J.C. Meek, Special Projects Consultant, December 8, 1972.

[2] Based on a memorandum from J.C. Meek to H. Callihoe, H.I. Hastings, and E.A. Torgunrud, December 12, 1972.

[3] _Ibid_., December 22, 1972.

[4] Based on a memorandum from J.C. Meek to H. Callihoe, H.I. Hastings, and E.A. Torgunrud, December 12, 1972.

[5] Based on a memorandum from J.C. Meek to J.S. Hrabi, February 22, 1973.

[6] Based on a memorandum from D. Ewasiuk, Associate Deputy Minister to Dr. E.K. Hawkesworth, Deputy Minister, March 5, 1973.

[7] Based on a memorandum from D. Ewasiuk, Associate Director of Field Services, to Field Services Personnel, March 16, 1973.

[8] Based on a memorandum from Lou Hyndman, Minister of Education to Dr. E.K. Hawkesworth, Deputy Minister, March 5, 1973.

[9] Based on a memorandum from J.C. Meek, Special Projects Consultant, to Dr. E.A. Hawkesworth, Deputy Minister of Education, March 9, 1973.

[10] Based on a memorandum from Dr. W.R. Duke, Director of Field Services to all Coordinators of Regional Offices, March 28, 1973.

[11] Based on a memorandum from J.C. Meek, Special Projects Consultant, to Dr. J.S. Hrabi, Associate Deputy Minister, March 29, 1973.

[12] Based on a memorandum from J.C. Meek, Special Projects Consultant, to Dr. W.R. Duke, Acting Director Field Services Branch, April 2, 1973.

[13] Based on a memorandum from Mr. H.A. Callihoe, Education Consultant, EOF to Mr. J.C. Meek, Coordinator, EOF, July 13, 1973.

[14] Based on a memorandum from Mr. J. Collins Meek, Coordinator, Educational Opportunities Fund to the Honorable L.D. Hyndman, Minister of Education, July 30, 1974.

[15] Based on the agenda items and a discussion paper presented at the EOF Policy Group Meeting, September 17, 1973.

[16] Based on a memorandum from J.S. Hrabi, Associate Deputy Minister to Mr. J.C. Meek, Coordinator, Educational Opportunities Fund, November 21, 1973.

SECTION IV

A DESCRIPTION OF THE EOF (COMPENSATORY) POLICY GUIDELINES, 1974[1]

The Educational Opportunities Fund was first announced in early April 1973. This fund made projects possible which were intended to:

(a) increase the number of students acquiring mastery of basic and auxiliary skills,

(b) increase the number of students maintaining or increasing self-confidence and self-respect, and

(c) increase the visibility of educational upgrading activities province-wide.[2]

Funds under EOF are directed into two areas of prime concern: elementary education and compensatory education.

All public or separate school students, in grades one to six, are eligible under the elementary component, provided that proposed project endeavours are approved by the Department of Education. The compensatory component is designed to serve the culturally, socially or environmentally disadvantaged students attending Alberta's public or separate schools at all grade levels from one to twelve, again with funding contingent upon a Department approved proposal.

Funds are disbursed on an approved proposal basis to support projects in a limited number of school jurisdictions where the needs for compensatory education are judged most urgent. EOF (Compensatory) funds are specifically earmarked to meet those educational needs of disadvantaged students which cannot be met through regular funding sources available to a school jurisdiction. The services provided to children under the compensatory component of the fund are to be above and beyond those normally available to all other children in the school district, and are to be of a nature, size and scope to give reasonable promise of meeting the priority needs of environmentally disadvantaged children. The overall objective of the compensatory component of EOF as stated in the Policy Manual is as follows: "to provide the extra assistance at the classroom level that culturally, socially or environmentally disadvantaged students may need [,] to aim at being on an equal footing with other students."[3] Funds are not provided under the compensatory component to support projects for pupils whose primary handicaps are physical, mental, emotional, or sensory as the needs of these children are provided for through Special Education Grants.

The emphasis of the fund is on delivering human educational resources which are of direct assistance to teachers and students at the classroom level. Therefore, funds are disbursed for instructional aides, specialist services, in-service education and other support related activities, but are not provided for existing expenditures of school boards or for school personnel positions which have as their major emphasis planning, administrative, coordinative or organizational activity. Funds are provided to conduct innovative and experimental projects to improve learning in the cognitive, affective, and psychomotor domains. The Department of Education recommends that projects be developed which will:

(a) offer new and unique strategies for teaching the skill subjects of reading, mathematics and language arts,

(b) improve the disadvantaged child's self-concept, and

(c) facilitate psycho-motor development by encouraging success in physical education endeavours.

Target groups of pupils identified for specific compensatory programs are to participate in regular programming to the extent possible, while remaining consistent with project objectives.

District eligibility for funding is established using a complex set of selection criteria based on environmental factors (economic, social and cultural) and educational variables. According to the 1974 EOF (Compensatory) policy guidelines, limited funds were available so only those rural jurisdictions having an equalized assessment of less than four thousand dollars per pupil were eligible for funding on a jurisdiction-wide basis. This criterion was selected because a district's financial capability to mount the extended educational programming effort necessary for compensatory education is directly related to its assessment base. As an additional reference, in marginal cases, the Department considered the residential component of assessment as it correlates highly with the proportion of disadvantaged students in an area. The initial set of criteria for qualification then was that the district had to demonstrate economic eligibility.

The four largest urban jurisdictions in the province were exempted from the basic economic criteria for eligibility. For the large urban districts, funding was limited to two hundred thousand dollars annually and was distributed on an approved proposal basis. The four largest urban districts had to compete for the available funds as did all those districts having equalized assessment per pupil figures in excess of four thousand dollars.

Those school jurisdictions deemed ineligible because of high per pupil assessment (above four thousand dollars), including the four largest urban districts, had to conduct a study to provide the Department with documentary evidence of the extent of environmental disadvantagement in selected school attendance areas of their jurisdictions. In order for a school attendance area to qualify, district personnel had to demonstrate either that:

(a) the equalized assessment per pupil was less than four thousand dollars for the school attendance area, or that

(b) the school attendance area was environmentally disadvantaged on the basis of a substantial number of socio-economic factors such as low level of education of parents, greatly sub-standard housing, or language of the home being other than English or French.

Within the four largest urban jurisdictions, eligible school attendance areas were identified on the basis of a number of variables including economic and health factors as judged by the Department of Education, Department of Health and Social Development, and other social agencies. Based on the evidence submitted by local school jurisdictions, the Department of Education attempted to direct the funds into those areas exhibiting the greatest need for compensatory education.

Once the geographic area (jurisdiction or school attendance area) is determined to be eligible, district level personnel then have to identify and present the Department with figures representing the number of educationally disadvantaged students within the targeted geographic area. Educationally disadvantaged pupils are defined as those who are age-grade retarded by one year or more, or who are of usual age-grade placement, but not benefiting from present programs as determined by appropriate indicators acceptable to the Department. Districts are not allowed to include among the numbers of disadvantaged children those pupils who are eligible for assistance provided under the Special Educational Services Branch.

By defining the eligibility of target children on the basis of educational disadvantagement, the Department is able to use a per pupil multiplier to establish the size of the grant available to a school jurisdiction. The maximum grant available to a district is calculated by multiplying the total number of educationally disadvantaged pupils, as determined above, by two hundred dollars. The resulting product is the base-line for annual funding and is adjusted from year to year according to a uniformly applied escalation factor to account for inflation. For educational programming purposes, a district is not restricted to the per pupil amount of two hundred dollars as this figure is used only for grant purposes. That is, provided a district stays within the ceiling grant, it is at liberty to plan projects of a nature, size, and scope commensurate with local needs. Of course, projects have to be consistent with government objectives for EOF (Compensatory).

As a final step in accessing the funds, district level personnel have to develop a comprehensive written project proposal and submit it to the Department of Education for approval. Consultants from the Regional Office are available upon request to assist teachers, school principals, and central office administrators with each phase of the project development process. The project proposal has to demonstrate that a needs assessment has been carried out, that a specific problem area has been addressed, that objectives have been established, and that a method of evaluation has been devised. The Department views as evidence of local involvement and commitment those proposals which have built-in financial and non-financial support of other local organizations and individuals. The funding of all proposals is contingent upon the Department receiving adequate documentary evidence to prove that the parents and school staffs support the project. The development and submission of proposals is not restricted to educators alone as both school and non-school personnel are encouraged to submit proposals to school boards.

Once a proposal is reviewed by the Department of Education, it falls into one of the following four categories: (a) approval, (b) conditional approval, (c) more information required, or (d) ineligible. The conditional approval category indicates that the Department of Education has agreed in principle with the proposed project idea but that more attention to some of the components is required. Conditional approval should be interpreted by the school system as authority to proceed with the project. It is assumed by the Department that the conditional requirements will not be difficult to meet, and that consequently the project will go forward. When the local districts submit inadequate information for the Department to make a decision about its approval status or ineligibility, a request is made for more information to clarify and substantiate certain proposal components. Proposals are deemed ineligible if they are interpreted by the Department as not meeting the guidelines in the form submitted. When a proposal is given final approval, a signed contract is drawn up between the local school board and the Department of Education. The contract specified the budget allocation for the project period and is attached to the proposal document making the proposal an integral part of the total agreement. The unique needs characteristic of each school jurisdiction and school attendance area define equally unique kinds of compensatory education projects. For the project period, 1973 to 1976, a total of forty-five individual proposals were approved and projects operated in twenty-one jurisdictions.

FOOTNOTES FOR SECTION IV

[1] Policy Manual, (Edmonton: Alberta Education, Educational Opportunities Fund), 1974.

[2] "A Framework for the Evaluation of the Educational Opportunities Fund," (Edmonton: Alberta Education, Educational Opportunities Fund), August 19, 1974.

[3] Policy Manual, op cit., pp. 3.

SECTION V

THE MERIT OF EOF (COMPENSATORY) POLICY GUIDELINES: A REPORT OF DATA BASED ON INTERVIEWS HELD IN ALL PARTICIPATING DISTRICTS

This section presents the findings which resulted from interviews conducted in all jurisdictions operating projects funded by EOF (Compensatory). Persons interviewed were asked to respond to the question, "Based upon your experience to date, what do you see as the major strengths and weaknesses of the EOF (Compensatory) policy guidelines as outlined in the Educational Opportunities Fund, Policy Manual, 1974."

The data analysis procedure used to analyze the interview transcripts resulted in a series of response sets for each of the program components discussed during the interviews. Each response set is introduced with a few statements which attempt to summarize the general tenor of the responses found in it. To illustrate the relative degree of support for each summary, response sets were assigned to two categories, *majority* and *minority*, and were then ranked from highest to lowest within each of these categories. The procedure used was to assign a rank of one to the response set containing n statements, where n represents the number of statements in the largest response set. A rank of two was then assigned to the response set containing the second largest number of statements, a rank of three to the next one and so on. Those response sets containing more than ½ n statements were assigned the majority classification, while those containing ½ n statements or less were placed in the minority category. It was arbitrarily decided to discard response sets with less than four statements as well as other miscellaneous responses. Refinement beyond this arbitrary line appeared not to add additional views which would support defensible conclusions.

To clarify or amplify the summary statements a few typical responses have been selected from the corresponding response set and printed in italic type following each statement. A letter in parentheses follows each response to show the source of the response. The code used is as follows: S = Superintendent, A = Assistant or Deputy Superintendent, P = Project Supervisor and B = School Board Member. Response sets are ranked continuously from one to forty. The first twenty-seven sets represent *majority* opinion while the last thirteen represent *minority* opinion.

MAJORITY OPINION

RESPONSE SET #1

A *majority* stated that when EOF (Compensatory) was first introduced, government expectations were not clearly communicated because the program guidelines were unclear. Planning problems arose from the use of poorly defined terms in the initial set of guidelines such as "disadvantagement" and "cultural handicap." The guidelines presented in the Policy Manual, 1974 were somewhat better than the initial set.

> *The intended target group for compensatory education projects was not clearly made known. (A)*
>
> *To my knowledge, the Department didn't provide a definition of a social or cultural handicap. (S)*
>
> *There was no clear definition of what the Department meant by social and cultural deprivation. There was no guidance as to what we should look for to present a case for social and cultural deprivation. (P)*
>
> *The guidelines printed in the 1974 policy manual are improved over the original guidelines that we operated on in getting the projects underway. (P)*

RESPONSE SET #2

It was felt by a *majority* that compensatory programs should run for a minimum of three years, and possibly for five or six years. Due to the nature of compensatory problems, it was generally felt that long-term projects were preferable to short-term projects.

> *Projects should be three years at a minimum. In fact, I'd like to see them continue for as long as six years. (S)*
>
> *Compensatory education projects address needs that can't be relieved in a short period of time. (S)*
>
> *Especially in the compensatory component longer projects are desirable. They should run for two or three years and maybe even longer. With the elementary component one year is fine for some projects. (A)*
>
> *Projects should be at least three years in length and preferably five. (S)*

RESPONSE SET #3

A *majority* felt that the written proposal requirement was a positive feature of the program because it encouraged districts to define problems, establish priorities, and formulate plans.

> *The proposals held focus on the actual objectives. The projects that we've done under this fund have been much more clearly defined than projects previously done and this definition is a direct result of having to write a proposal. (A)*
>
> *The written proposal requirement was one of the more positive features of the Fund because it gave people an opportunity to put things down and really get a grip on directions. (P)*
>
> *The experience of preparing proposals gives one the opportunity to think through very carefully what is really wanted. (S)*
>
> *Written proposals force you to do some planning. (A)*

RESPONSE SET #4

A *majority* perceived the evaluation requirement to be a positive feature of the program. Evaluation was seen by those interviewed as a means of assessing current needs, improving the operation of projects and determining the effectiveness of completed efforts.

> *Evaluation is necessary to find out whether or not the program is working. (A)*
>
> *We definitely support the evaluation requirement. (S)*
>
> *At the end of a project term you have to look at the effectiveness of what has happened and whether or not the original needs still exist. (A)*
>
> *Our board wants to know where we are going and what we are getting from this type of program. (B)*

RESPONSE SET #5

A *majority* perceived the integration of EOF projects as desirable. It was generally felt that at the classroom level integration was crucial, while at the administrative level keeping funding categories separate was a nuisance.

> *If you could place all of the funds into one PAB number and have one written proposal for the whole project, it would be much more workable from an administrative point of view. (A)*
>
> *It's instructionally unsound to keep the various projects separate at the classroom level. (A)*
>
> *We don't see the two objectives of the Fund as distinct. We operate the two components as one. (P)*

RESPONSE SET #6

A *majority* felt that project grants were preferable to grants based on pupil enrollment. Reasons stated were that under project funding an amount is assured regardless of fluctuations in enrollment, and project grants allow for a concentration of funds on the pupils with the greatest needs.

> *Out-right project grants permit local school systems to concentrate funds on the students with the greatest needs. (A).*
>
> *Project grants permit the funding to be adjusted for the depth and seriousness of disadvantagement. (A)*
>
> *An advantage of project grant funding is that the funds are assured. If funding is based on a per pupil grant, it can fluctuate from year to year depending on enrollment. (S)*
>
> *An outright project grant is preferred because it is more stable. (A)*

RESPONSE SET #7

A *majority* felt that, while it is important to have non-financial community support behind a project, it is unrealistic to expect financial support to come from organizations and individuals in a "disadvantaged" community.

> *It's very difficult to expect contributions from local organizations in a disadvantaged area. (S)*
>
> *It's very difficult to get commitments for funding from other sources when you are in a disadvantaged area. The commitments that we got were in terms of personal backup and willingness to support and be involved in the programs. (P)*
>
> *Holding fund-raising activities in an area that's economically disadvantaged is ridiculous. (A)*
>
> *Requiring financial support from other local organizations and individuals is unrealistic in a disadvantaged area. (A)*

RESPONSE SET #8

A *majority* believed that project approval should not depend upon commitment to obtaining parental involvement. It was generally felt that, while parental support and involvement are desirable, they are often difficult to obtain in a disadvantaged area.

> *While parental support is desirable, it should not be made a necessary condition for funding a proposal. This leads to a lot of "cookery." (A)*
>
> *It's very difficult to get parental involvement in a disadvantaged area. (A)*
>
> *Frequently parents of disadvantaged students aren't at home during the day. (P)*
>
> *It's nice to see parents interested but I don't think that the operation of the project should be exclusively dependent upon whether or not parents are really truthfully participating. (S)*

RESPONSE SET #9

A *majority* felt that the selection of students on a school attendance area basis was not a desirable feature of the program because it wrongly assumed that one would always find pockets of disadvantagement in school jurisdictions.

> *The guidelines assume that you will find pockets of disadvantagement in the province. This was not our experience. Students in need were sprinkled throughout our entire system. (P)*
>
> *The feature of the guidelines which requires you to target a school attendance area is undesirable. Disadvantaged students are sprinkled throughout our system. (A)*
>
> *Selection of pupils on a school attendance area basis results in a lot of duplication of effort. System-wide proposals are much preferred. (A)*
>
> *Selection of pupils on a school attendance area basis caused difficulty. Projects that were suggested tended to cross attendance area boundaries, particularly at the secondary level. It was difficult to find enough students within a school attendance area who qualified for the funds. (P)*

RESPONSE SET #10

A *majority* felt that the expanded scope of the program, which included grades one to twelve, was desirable.

> *We agree with the grade one to twelve emphasis. (S)*
>
> *The scope of the Fund from grades one to twelve is much better than from one to six as in the elementary component. The problems don't end at the end of grade six. (A)*

The scope of the Fund being from one to twelve is a very positive feature of the guidelines. (B)

RESPONSE SET #11

A *majority* felt that terms such as "disadvantaged" and "cultural handicap" should be used with discretion or perhaps omitted altogether.

The term "educationally deprived" might be a little more acceptable. (P)

The guidelines should state that the projects are for those who are one or two years behind in basic skills or who appear to have other educational problems, but the term disadvantaged shouldn't be used. There's a stigma associated with that term. (A)

The disadvantaged label is a touchy thing. (P)

Really, when it comes to a fine line, just what is a cultural handicap? (S)

RESPONSE SET #12

A *majority* found the service and cooperation from Regional Offices satisfactory or better, particularly in the area of project planning.

Regional Office cooperation has been excellent. (S)

One of the best contributions that the Regional Offices made to our district was in terms of their consultative assistance in writing proposals. (A)

The Regional Office was a big help, but it's understaffed. (A)

The Regional Office helped us clarify the guidelines. (S)

RESPONSE SET #13

A *majority* believed that the government should provide funds for the planning of compensatory projects. Preparation of compensatory proposals is time-consuming and takes personnel away from their regular duties. There is a danger under the present system that the regular school program may suffer as a result.

The present program policy guidelines do not permit any kind of planning or developmental work. This is a major weakness of the Fund. (A)

> *You've got to have money to plan a project because time is taken away from regular duties and your regular work doesn't get done. (S)*

> *Because of the nature of the learning difficulties inherent in the compensatory type student, a lot of research and planning have to go into the development of compensatory projects. Perhaps there is an even greater need to provide funds for planning under the compensatory component for this reason. (S)*

RESPONSE SET #14

A *majority* expressed the view that the government should provide funds for the administration, coordination, and organization of projects, especially in those situations where project management places such excessive demands on available human resources that the quality of the regular school program is endangered.

> *When the Department refuses to fund positions for administration and coordination, they not only short-change the project but also the total school program. (S)*

> *The government's refusal to fund administrative, coordinative or organizational activities creates a very severe hardship and probably results in valuable and very much needed programs not being instituted in some systems. (S)*

> *While the major emphasis in these programs should be at the classroom level, there must be someone who can plan, organize and direct the projects. Otherwise, the returns will be minimal. (A)*

> *The Department should allow at least five per cent of the grant for administration. (S)*

RESPONSE SET #15

A *majority* reported that the conditional approval category caused confusion. This confusion appeared to arise from the Department's failure to communicate its expectations about each of the conditions which it applied to a proposal, and also failure to communicate the assurance to local project personnel that funds were guaranteed if the conditions were met.

> *We didn't know what conditional approval meant. We didn't know whether we should start or not start. (A)*

> *We took conditional approval to mean non-approval. The project was held up for six months until we got final approval. It was only then that we hired staff and purchased materials. (P)*

> *There should just be two categories, "approved" and "not approved." (S)*

> *The ineligible category would not be necessary if the guidelines were clear. (A)*

RESPONSE SET #16

A *majority* felt that the level of funding should be determined by the degree of need in an area and by the size, complexity, and length of a project proposed.

> *While the per pupil assessment is one indicator of the money available to a community for educational purposes, it doesn't take into consideration the fact that, from one jurisdiction to another, there may be various and different factors that place a drain on the educational dollar. The Department must look carefully at the local situation and provide special consideration when circumstances warrant it. They must be cognizant of the individual needs of a district. (A)*

> *Funding based on the nature, size and scope of a project is best, provided you don't have to go through a lot of red tape to meet the government's requirements. (S)*

> *The level of funding in a project should be determined by the seriousness of the students' needs. (S)*

RESPONSE SET #17

A *majority* felt that the selection of target pupils should be based on educational rather than cultural, social or environmental data. There are dangers in categorizing children for educational purposes on non-educational variables. Some concern was expressed about the meaning of, the criteria for, and the evidence required with respect to cultural, social or environmental disadvantagement. Educational criteria are more meaningful and are readily available to educators in local school systems. Collecting data on cultural, social or environmental disadvantagement locally can be dangerous unless completely unobtrusive techniques are used. As educational disadvantagement is related to social and cultural disadvantagement, one would probably target almost the same pupils if educational data alone were used.

> *The most seriously educationally disadvantaged are also the most seriously culturally, socially and economically disadvantaged. (A)*

> *We would like some clear definition that would readily enable one to identify the students on the basis of educational data.*

> *I feel that perhaps the need for compensatory education should be based more on educational disadvantagement criteria rather than cultural or economic disadvantagement criteria. (S)*

> *My comments are, the meaning of this (culturally, socially, environmentally disadvantaged), the criteria for this, and the evidence required - those are really the three questions that everyone has (- the meaning of, the criteria for, and the evidence required with respect to that point and). I think there is a fair amount of confusion there. (A)*

> *Concerning the selection of target students for compensatory education, I believe that the criteria of educational need is most meaningful and perhaps should be the one used. (S)*

> *Data on educational disadvantagement is readily available in our school system, whereas data on other types of disadvantagement must be sought from other social agencies. (A)*

> *It is dangerous to try to collect data on social and cultural disadvantagement locally because you may have to probe into the private lives of people. Methods used to collect such data locally would have to be completely unobtrusive. (A)*

RESPONSE SET #18

A *majority* found the initial qualifying criteria of economic eligibility acceptable. School jurisdictions in economically deprived areas are usually less capable of providing the required level of financial support for compensatory projects, and there is generally a high incidence of educational problems in economically depressed areas. While there may be needs for compensatory education in all districts, with the current low level of funds appropriated by the Government for compensatory education, it is reasonable to direct funds to those jurisdictions experiencing the greatest degree of financial hardship.

> *Using economic assessment as the first criterion for eligibility is acceptable and I can't really quarrel with that. (A)*

> *Establishing economic eligibility is desirable because in economically depressed areas school boards have less money, and secondly because there is generally a high correlation between poverty and educational problems. (A)*

> *Given the limited funding that's available for compensatory education, it appears reasonable that first priority should be given to those districts that have financial hardships. (S)*

> *Because there are needs in every district, compensatory funding should be open to all areas of the province. However, considering the limited amount of money available at present, perhaps the first criteria of economic eligibility is acceptable. (A)*

RESPONSE SET #19

A *majority* stated that earmarked grants or project grants are desirable for compensatory education. Earmarked or project grant funding helps to ensure that funds actually reach the intended targets.

> *An advantage of project funding over straight dollar grants is that when an eductor has an idea or an approach that is going to be of value, it is not subject to interference from local politics. (S)*
>
> *An advantage of earmarked grants is that they do get the job done and the funds do end up where they're supposed to go rather than being put into general revenue. (S)*
>
> *An advantage of project funding compared to formula funding is that the funds actually reach the target that they were intended for. (A)*

RESPONSE SET #20

A *majority* believed that circumstances may exist where special consideration should be given to funding existing expenditures of school boards. In situations where these expenses arise from compensatory projects already in operation, which have objectives compatible with provincial compensatory program objectives, there is no reason why the Department should not give consideration to compensating local school boards for expenditures arising from existing projects.

> *If a district is operating a compensatory project which has objectives consistent with the government objectives, then there's no reason why the government shouldn't fund existing expenditures of school boards. (A)*
>
> *Progressive boards which already have programs operating consistent with the objectives of the Fund would be penalized by the guideline that states the program will not fund existing expenditures of school boards. (A)*
>
> *If the objectives of compensatory programs already in operation are consistent with government objectives then I think the government should provide funds for the existing expenditures to support those programs. (S)*

RESPONSE SET #21

A *majority* felt that, while it was important that the proposals be presented in writing, a face-to-face meeting with the Coordinator of the EOF would have been valuable, particularly during the initial project planning phase.

> *We should be able to have a face-to-face confrontation with the Department to discuss our initial proposal. (P)*
>
> *A combination of both written proposals and face-to-face discussions are desirable. (S)*
>
> *It's a good idea to have a face-to-face discussion with the EOF coordinator before beginning to write the proposal. (A)*

RESPONSE SET #22

A *majority* believed that the objective of the EOF (Compensatory) program was good, and that the intent of the government was clear.

> *It's a desirable objective. (A)*
>
> *The objective is a very noble idea. (B)*
>
> *The intent of the government was clearly known. (B)*

RESPONSE SET #23

A *majority* felt that it was acceptable to exclude physically, mentally and emotionally handicapped pupils from the EOF (Compensatory) fund as grants to support programs for pupils with these handicaps are available from other sources.

> *Those with physical, mental and sensory handicaps are provided for through different financing so it's fair enough to omit them from compensatory funding. (S)*
>
> *Excluding the physically, emotionally and mentally handicapped was a positive feature of the program policy guidelines. (A)*
>
> *The funds under compensatory are aimed at different students and different needs than Special Education Grants and I'm in favor of the focus. (A)*
>
> *Excluding the physical, mental and sensory handicapped was no problem because we have funds for those students in our system. (P)*

RESPONSE SET #24

A *majority* felt that the feature of the program which required local project personnel to provide the Department with documentary evidence of disadvantaged status from locally derived data was undesirable.

> *The aspect of the guidelines which requires you to demonstrate that a geographic area comes below some arbitrary poverty indicator is a poor feature of the guidelines. (A)*
>
> *We had a great deal of difficulty in gathering the kinds of educational data that the Department required, yet at the same time no one would argue that the school or the community was culturally or socially disadvantaged. (S)*
>
> *Having to document the disadvantaged status of the community through the use of questionnaires or door-to-door surveys is not desirable. (B)*

RESPONSE SET #25

A *majority* perceived the emphasis on intensifying human resources at the classroom level to be a positive feature of the program.

> *The emphasis on the human resource component at the classroom level is a good feature of the Fund. (S)*
>
> *There are times when equipment is necessary in order to promote a good program and I believe that there should be a very close scrutiny of the need and of the provision of equipment. I would like to see some support for material resources but it should be minimal. (P)*

RESPONSE SET #26

A *majority* felt that funding coordination with the Department of Indian Affairs was a good feature of the program.

> *Funding coordination with Indian Affairs was a good feature and presented no problems. (S)*
>
> *Funding coordination with Indian Affairs provided no problem. (S)*

RESPONSE SET #27

A *majority* felt that the feature of the program which encouraged staff support for a project was desirable.

> *You must have staff input as well as staff support. (A)*

Staff support is essential. (A)

I strongly agree with the requirement of the guidelines for staff support. (S)

MINORITY OPINION

The following statements have been classified as representing *minority* opinion. The response sets are listed in order from highest to lowest to show the degree of support for each introductory statement.

RESPONSE SET #28

A *minority* felt that the Department should provide more assistance with the evaluation of projects.

The evaluation model presented in the guidelines is a conceptual model. The Department should offer a practical working model which is simple enough for a classroom teacher to use. (P)

As far as evaluation is concerned, it takes a tremendous amount of time to prepare, design and find the instruments and this is where the Regional Office could help us. (A)

Local systems don't have the expertise to do a complex evaluation. (A)

The Department should help us build good evaluation designs into the proposals. (A)

RESPONSE SET #29

A *minority* felt that service and cooperation from Regional Offices could be improved in the area of project evaluation.

The Regional Office has neither the time nor the expertise to assist district people in developing evaluation designs. (A)

The Regional Office gave us a cautiously worded evaluation but didn't provide much follow-up support. (P)

There should be a specialist in evaluation in every Regional Office. (S)

RESPONSE SET #30

A *minority* felt that the emphasis of EOF (Compensatory) on parental involvement was a positive feature of the program.

> *The Department's insistence on parental involvement was a positive feature of the Fund. (P)*

> *I would like to see the schools place more emphasis on parental involvement. (B).*

> *We have parental involvement now and we're encouraging it more and more. We want to use as many of the experiences of parents as we possibly can, eg. story telling by the elders, talking about the native culture, teaching native crafts, etc. (A)*

RESPONSE SET #31

A *minority* expressed a desire for the Department to decide which areas in the province need compensatory funds, and then to announce the share of funds available to eligible districts. This would ensure that only those districts which were to receive funds would invest time and resources in the preparation of proposals. It would also eliminate competition which is perceived by some to be undesirable.

> *The Department should announce the share of funds available to individual school systems. This would save time and eliminate the undesirable competition for funds. (A)*

> *Having to compete for available scarce resources is an undesirable feature of the present program policy guidelines. (A)*

> *The Department should announce the share of funds available to a district. The district can then plan a proposal up to the level of the funding available. (A)*

> *For the amount of the work that has to go into a compensatory proposal, you should be assured of funds before you begin to write it. No one likes to spend weeks or months on a proposal with no certainty that it's going to result in funding. (A)*

RESPONSE SET #32

A *minority* cited disadvantages associated with project grant funding. Problems mentioned included: (1) the written proposal requirement was too complex and therefore very time-consuming; (2) areas which submit the best proposals may not be the ones in greatest need of funding; (3) the uncertainty about whether funds will continue at the end of a project makes long-range planning difficult, (4) small jurisdictions are at a disadvantage because they lack the back-up resources to compete with larger districts.

> *The proposal requirement was too complex. I'm sure that something much simpler would still meet the same objectives. (A)*
>
> *To meet the expectations of the Department concerning written proposals, we have to pull an administrator from the work that he customarily does. As a result, the regular program suffers. (S)*
>
> *There's a danger under project funding to award money on the basis of who can write the best proposal, both in terms of content and style, rather than in terms of where the greatest needs are. (A)*
>
> *The uncertainty at the end of the project is a disadvantage of all types of time specific funding, regardless of the length of the period. (A)*
>
> *In a small system we don't have the resources and back-up personnel to spend hours developing proposals which would meet the expectations of the Department. (S)*

RESPONSE SET #33

A *minority* reported that the recycling of proposals several times to get them into a form acceptable to the Department was a problem.

> *As a result of the extensive recycling process required to get our proposal in a form that was approved by the government, we missed out on the first year of the Fund. (A)*
>
> *We weren't in the Special Grants Club before so they made us recycle our proposals several times to make it very difficult for us to get money. (A)*
>
> *I agree with the idea of writing a proposal, but not with resubmitting the thing four or five times. (S)*

RESPONSE SET #34

A *minority* expressed the view that earmarked grants are not desirable. It was felt that the Department should disburse the funds and then trust districts to spend them in the best interests of the target pupils.

> *The Department people have to exercise a certain amount of faith that the special funds are going to be spent in the best interests of the students. (B)*

> *The Department should look at the past performance of a district and if it measures up well, it should then be able to operate to a large extent on a trust basis. (B)*

> *Under earmarked funding, Edmonton seduces a district into doing something other than what that district had decided was the correct educational direction for it to take. (A)*

> *People at the local level who are active in the grass roots of education should not require civil servants' approval of how they're going to satisfy the needs of their areas. Funding should require Department of Education approval and should be based on needs assessment, but it should be up to the local jurisdictions to decide where and how the funds will be spent. Local people would, of course, be expected to evaluate and report on how effectively they are addressing the needs in their areas. (A)*

> *We want to be accountable to the government but give us local autonomy. (P)*

> *We need flexibility at the local level to direct the funds to the sources of greatest need. However, at the same time we're perfectly prepared to account to the government. (S)*

RESPONSE SET #35

It was felt by a *minority* that a project coordinator was essential, particularly for large projects.

> *For large projects, such as ours, we have to have an EOF coordinator. (A)*

> *A project coordinator is most certainly necessary. I have been using my deputy and a vice-principal of a school in that capacity. Efforts devoted to the EOF project remove them from their regular duties. (S)*

> *Without the project coordinator, we couldn't do many of the things that we're doing in terms of planning, curriculum committee meetings, follow-up, helping teachers at the classroom level, helping with conferences, seminars, and in general, helping with the total direction of education. (S)*

RESPONSE SET #36

A *minority* believed that in view of the limited funds available, compensatory projects should concentrate on the lower grades to emphasize a preventive approach.

> *The nature of the need in compensatory education requires concentrated effort and therefore concentrated financing. If you spread it over too many grades and over too many different types of programs, then you are not going to do as effective a job as if you concentrated more. (A)*
>
> *With the money that was available, the scope grades one to twelve was too great. (A)*
>
> *Concentrating funds on the lower grade levels would emphasize a preventive approach. (A)*

RESPONSE SET #37

A *minority* felt that if there was a high proportion of native children in an area, the chances of getting a proposal approved were increased.

> *I think there was a great preference for Indian and Metis children. If the majority of children were of native ancestry you had a 99% chance of getting approval. (S)*
>
> *There was the distinct impression left that, if the proportion of Indian students wasn't above some arbitrary line, you wouldn't receive funding. (P)*
>
> *We were below the $4,000.00 cut-off and should have qualified for funds, but we were told that we didn't have a high enough proportion of Indian students. (A)*

RESPONSE SET #38

A *minority* suggested that the Department of Education should look into the possibility of compiling data which has already been collected by other social and governmental agencies which may be useful in determining the areas in the province which have the greatest need for compensatory aid.

> *The Department should use data available from social agencies, Statistics Canada and Alberta Statistics to determine which areas of the province are socially and economically disadvantaged. (A)*
>
> *The Department should get an estimate of the numbers of disadvantaged students in the province and where they are located. (A)*

RESPONSE SET #39

A *minority* felt that a single fund should be provided which would encompass all types of handicaps.

> *It is our opinion that all children should be included in special programs if they need it, regardless of the type of handicap. (P)*
>
> *Separation of the physically, mentally, and emotionally handicapped is an artificial distinction. All students with educational handicaps or learning difficulties should be provided with special programs. The Department should provide one source of funds and permit the local districts to develop projects which address learning difficulties regardless of their causes. (S)*
>
> *There are some students with sensory and motor physical defects who are also disadvantaged. You have to look at the total child. (S)*

RESPONSE SET #40*

A *minority* felt that coordination between the Department of Indian Affairs and the Department of Education should take place at the provincial level.

> *There should be some general agreement at the provincial level between the Departments of Education and Indian Affairs to fund on a pro-rated basis. While we had no problems at the local level, we would prefer that the two departments get together at the provincial level. (S)*
>
> *Concerning compensatory education, there should be some coordination at the provincial level between the various departments of the government and jointly-funded projects. (S)*

SUMMARY

The following is a summary of majority and minority opinion about the merit of EOF (Compensatory) program guidelines as viewed from the perspective of persons interviewed in all participating districts. Statements have been rank ordered from highest to lowest to show the degree of support for them.

MAJORITY OPINION

1. When EOF (Compensatory) was first introduced, government expectations were not clearly communicated because the program guidelines were unclear. Planning problems arose from the use of poorly defined terms in the initial set of guidelines such as "disadvantagement" and "cultural handicap." The guidelines presented in the Policy Manual, 1974 were somewhat better than the initial set. (Response Set #1)

2. Due to the nature of compensatory problems, longer term projects of three to six years are preferred to shorter, one and two year terms. (Response Set #2)

3. The written proposal requirement was a positive feature of the program because it encouraged districts to define problems, establish priorities and to formulate plans. (Response Set #3)

4. The evaluation requirement was a positive feature of the program. Evaluation was seen as a method of assessing current needs, improving the operation of projects and determining the effectiveness of completed efforts. (Response Set #4)

5. Integration of EOF projects was desirable, particularly at the instructional level; however, at the administrative level, keeping funding categories separate was a nuisance. (Response Set #5)

6. Project grants are preferred to grants based on pupil enrollments because they are more stable and also because they allow for funds to be distributed according to the severity of needs. (Response Set #6)

7. While it is important to have non-financial community support behind a project, the Department's expectation of financial support from local organizations and individuals in "disadvantaged" areas was unrealistic. (Response Set #7)

8. While parental support and involvement are desirable, the approval of compensatory projects should not depend upon commitment to obtaining support and involvement. This requirement may result in efforts to contrive support with the resulting commitment demonstrated in the proposal document not being genuine. (Response Set #8)

9. The selection of students on a school attendance area basis was not a desirable feature of the program because it wrongly assumed that one would always find pockets of disadvantagement in school jurisdictions. (Response Set #9)

10. The expanded scope of the program, which included grades one to twelve, was a good feature. (Response Set #10)

11. Terms and labels such as "disadvantagement" and "culturally handicapped" should be used discretely and possibly omitted entirely. (Response Set #11)

12. Service and cooperation from Regional Office staffs has been satisfactory or better, particularly in the area of project planning. (Response Set #12)

13. The government should provide funds for planning compensatory projects. Preparation of compensatory proposals is time-consuming and takes personnel away from their regular duties. There is a danger under the present system that the regular school program may suffer as a result. (Response Set #13)

14. The government should provide funds for the administration, coordination and organization of projects especially in those situations where project management places such excessive demands on available human resources that the quality of the regular school program is endangered. (Response Set #14)

15. The conditional approval category caused confusion. This confusion appeared to arise from the Department's failure to communicate its expectations about each of the conditions which it applied to a proposal and also failure to communicate the assurance to local project personnel that funds were guaranteed if the conditions were met. (Response Set #15)

16. The level of funding should be determined by the degree of need in an area and by the size, complexity and length of the project proposed. (Response Set #16)

17. The selection of target pupils should be based on educational data rather than cultural, social or environmental data. There are dangers in categorizing children for educational purposes on non-educational variables. Some concern was expressed about the meaning of, the criteria for, and the evidence required with respect to cultural, social or environmental disadvantagement. Educational criteria are more meaningful and are readily available to educators in local school systems. Collecting data on cultural, social or environmental disadvantagement locally, can be dangerous unless completely unobtrusive techniques are used. As educational disadvantagement is related to social and cultural disadvantagement, one would target almost the same pupils if educational data alone were used. (Response Set #17)

18. The initial qualifying criterion of economic eligibility is acceptable. School jurisdictions in economically deprived areas are usually less capable of providing the required level of financial support for compensatory projects, and there is generally a high incidence of educational problems in economically depressed areas. While there may be needs for compensatory education in all districts, with the current low level of funds appropriated by the government for compensatory education, it is reasonable to direct funds to those jurisdictions experiencing the greatest degree of financial hardship. (Response Set #18)

19. Earmarked grants or project grants are desirable for compensatory education. Earmarked or project grant funding helps to ensure that funds actually reach the intended targets. (Response Set #19)

20. Circumstances may exist where special consideration should be given to funding existing expenditures of school boards. In situations where those expenses arise from compensatory projects already in operation, which have objectives compatible with provincial compensatory program objectives, there is no reason why the Department should not give consideration to compensating local school boards for expenditures arising from existing projects. (Response Set #20)

21. While it is important that proposals be presented in writing, a face-to-face meeting with the Coordinator of the Educational Opportunities Fund would be valuable, particularly during the initial project planning phase. (Response Set #21)

22. The objective of the EOF (Compensatory) program was good and the intent of the government was clear. (Response Set #22)

23. It is acceptable to exclude physically, mentally and emotionally handicapped pupils from the EOF (Compensatory) fund, as grants to support programs for pupils with these handicaps are available from other sources. (Response Set #23)

24. The feature of the program which required local project personnel to provide the Department with documentary evidence of disadvantaged status from locally derived data was undesirable. (Response Set #24)

25. The emphasis on intensifying human resources at the classroom level is a positive feature of the program. (Response Set #25)

26. The coordination of funding with the Department of Indian Affairs was a good feature of the program. (Response Set #26)

27. The feature of the program which encouraged staff support for a project was desirable. (Response Set #27)

MINORITY OPINION

The following summary statements represent minority opinion. They are also listed in order from highest to lowest, according to the degree of support for them.

28. The Department should provide more assistance with the evaluation of projects. (Response Set #28)

29. Service and cooperation from the Regional Offices could be improved in the area of project evaluation. (Response Set #29)

30. The emphasis of EOF (Compensatory) on parental involvement was a positive feature of the program. (Response Set #30)

31. The Department should decide which areas in the province need compensatory funds and then announce the share of funds available to

eligible districts. This would ensure that only those districts which were to receive funds would invest time and resources in the preparation of proposals. It would also eliminate competition which is perceived by some to be undesirable. (Response Set #31)

32. A minority cited disadvantages associated with project grant funding. Problems mentioned include: (1) the written proposal requirement was too complex and, therefore, very time-consuming; (2) areas which submit the best proposals may not be the ones in greatest need of funds; (3) the uncertainty about whether funds will continue at the end of a project makes long-range planning difficult; and (4) small jurisdictions are at a disadvantage because they lack the back-up resources to compete with larger districts. (Response Set #32)

33. The recycling of proposals several times to get them into a form acceptable to the Department was perceived by some to be a problem. (Response Set #33)

34. Earmarked grants are not desirable. The Department should distribute funds and then trust districts to spend them in the best interests of the target pupils. (Response Set #34)

35. A project coordinator is essential, especially for large projects. (Response Set #35)

36. Because of the limited funds available, project efforts should be concentrated at the lower grade levels to emphasize a preventive approach. (Response Set #36)

37. If there was a high proportion of native children in an area, the chances of getting a proposal were increased. (Response Set #37)

38. The Department should look into the possibility of compiling data already collected by other social and governmental agencies which may be useful in determining the areas of the province which have greatest need for compensatory aid. (Response Set #38)

39. A single fund to support projects for all types of handicaps would be desirable. (Response Set #39)

40. Coordination between the Department of Education and the Department of Indian Affairs should take place at the provincial level. (Response Set #40)

SECTION VI

THE MERIT OF EOF (COMPENSATORY) POLICY GUIDELINES: A REPORT OF DATA BASED ON MAIL QUESTIONNAIRES AND TELEPHONE INTERVIEWS

After a preliminary analysis of the data from the initial set of interviews had been completed, statements were randomly selected from the response sets to form three follow-up questionnaires. A matrix sampling procedure was used to present a representative sample of original ideas to a group of eighty-one respondents. Included in the respondent group were all superintendents (S), assistant and deputy superintendents (A), project supervisors (P), and school board chairmen (B) in the twenty-one districts participating in the EOF (Compensatory) program.

The questionnaires presented statements which were quoted directly from interviewees' comments in the initial round of interviews, and asked respondents to select the response option (strongly agree, agree, undecided, disagree, or strongly disagree) which indicated their level of agreement or disagreement with each statement. Respondents were also asked to give reasons for their choices.

The data is reported in this section by displaying the results under three headings. First, the quotation selected from the interview data is presented in italic type under the heading "Statement." Then a statement is presented under the heading "Findings," which reveals the reactions of the respondent group to the quotation. The term "majority" is used to indicate more than fifty per cent response on either side of the agree-disagree scale. The exact percentage response follows in parentheses. (To facilitate presentation, the two agree and disagree categories on each side of the scale were collapsed into a single category. Detailed responses on all five points may be found in Table 5.)

A "Discussion" follows the presentation of the percentage responses. Here the respondents' reasons for agreeing or disagreeing with the statement are summarized. Included also are samples of the respondents' comments taken from both the telephone interviews and comments written on questionnaires. The statements were rank ordered and presented according to the degree of concensus exhibited in the percentage responses. A summary of the results follows at the end of the section.

TABLE 5

RESPONSES TO ROUND TWO DELPHI
IN PARTICIPATING DISTRICTS

	Statement	SA	A	U	D	SD
1.	I think the government's insistence on program evaluation is a good idea.	41.7	58.3	0.0	0.0	0.0
		100.0		0.0	0.0	
2.	Parental support for projects is desirable, but should not be a required condition of funding.	37.5	58.3	4.2	0.0	0.0
		95.8		4.2	0.0	
3.	I think its a desirable objective	37.5	58.3	0.0	4.2	0.0
		95.8		0.0	4.2	
4.	Allowing integrated projects which are administratively separate at the provincial level but which encompass both the Elementary and Compensatory component of EOF as well as ECS, LDF and others is a positive feature of the policy guidelines.	21.4	71.4	7.1	0.0	0.0
		92.9		7.1	0.0	
5.	A positive feature of the Fund was that it was for all school pupils in grades one to twelve in all districts eligible for compensatory funding.	42.9	50.0	0.0	7.1	0.0
		92.9		0.0	7.1	
6.	While there may be certain disadvantages associated with the funding of compensatory education projects on the basis of approved proposals, overall the written proposal requirement represents a positive feature of the Fund.	21.4	71.4	0.0	7.1	0.0
		92.9		0.0	7.1	
7.	The Department should not restrict funding to individual school attendance areas. Districts should have the option to submit several school level proposals or one system level proposal or a combination of both.	37.5	54.2	0.0	8.3	0.0
		91.7		0.0	8.3	
8.	The emphasis in EOF (Compensatory) on the human resources component at the classroom level is a positive feature of the Fund.	47.8	43.5	8.7	0.0	6.0
		91.3		8.7	0.0	
9.	While I am in favour of writing a proposal for the educational program itself, I am not in favour of having to carry out a thorough study documenting disadvantaged status in order to prove to the government that we are a disadvantaged area.	4.3	87.0	0.0	8.7	0.0
		91.3		0.0	8.7	
10.	I think it's a good goal statement.	21.7	65.2	4.3	8.7	0.0
		87.0		4.3	8.7	
11.	District eligibility for compensatory funding was established using a set of selection criteria based on economic, social, cultural and educational variables. All these variables must be considered to establish which jurisdictions are eligible for funding.	21.7	65.2	4.3	8.7	0.0
		87.0		4.3	8.7	
12.	Before expecting extensive and elaborately written proposals, the Department should first of all give approval in principle to a project idea.	35.7	50.0	0.0	7.1	7.1
		85.7		0.0	14.3	
13.	The split between human and material resources in the funding of a project should be flexible and determined by the nature of the project.	35.7	50.0	14.3	0.0	0.0
		85.7		14.3	0.0	

Strongly Agree = SA   Agree = A   Undecided = U   Disagree = D   Strongly Disagree = SD

TABLE 5 (Cont.)

Statement	SA	A	U	D	SD
14. We would prefer to deal directly with the EOF Coordinator instead of the ROE. We are interested in having communication channels with the Department that are clear, open and fast so we can get a quick reply and I think dealing directly with the Department enables us to do that.	50.0	35.7	7.1	7.1	0.0
	85.7		7.1	7.1	
15. Concerning the target population for the fund (culturally, socially and environmentally disadvantaged pupils in grades one to twelve), the Department never clearly made it known how these pupils were to be identified.	8.7	73.9	8.7	8.7	0.0
	82.6		8.7	8.7	
16. Every proposal should have all costs built into it, including all human and material resources necessary for needs assessment, project planning, implementation, formative evaluation and summative evaluation.	13.0	56.5	8.7	21.7	0.0
	82.6		8.7	8.7	
17. Excluding the physically, emotionally and mentally handicapped from compensatory funding is a positive feature of the present guidelines.	13.0	69.6	4.3	8.7	4.3
	82.6		4.3	13.0	
18. The point that we wish to make very strongly is that we would like to see some clear definition that would enable us to identify students for compensatory education on the basis of educational data.	33.3	45.8	4.2	8.3	8.3
	79.2		4.2	16.7	
19. Funding of projects in proportion to their nature, size and scope rather than on a fixed per pupil basis is a positive feature of the present policy guidelines.	14.3	64.3	14.3	0.0	7.1
	78.6		14.3	7.1	
20. Because funds are limited, districts should be told what the ceiling figure is for their jurisdictions before beginning to write a proposal.	28.6	50.0	7.1	7.1	7.1
	78.6		7.1	14.3	
21. The government's objective for EOF (Compensatory) has not been accomplished in our district.	0.0	14.3	7.1	57.1	21.4
	14.3		7.1	78.6	
22. A good feature of the present method of funding compensatory education which calls for written project proposals is that school boards can be held accountable for the funds	8.7	69.6	8.7	13.0	0.0
	78.3		8.7	13.0	
23. The preferred method of funding compensatory education is through a combination of project funding and formula funding.	4.3	69.6	21.7	4.3	0.0
	73.9		21.7	4.3	
24. The objective of EOF (Compensatory) is an ideal which can never be accomplished.	0.0	26.1	0.0	52.2	21.7
	26.1		0.0	73.9	
25. The Department should move compensatory education from a three year project cycle to a five year cycle.	42.9	28.6	7.1	21.4	0.0
	71.4		7.1	21.4	
26. While funding of compensatory education on the basis of Department approved proposals has certain disadvantages, it is much preferred to formula funding.	7.1	64.3	14.3	7.1	7.1
	71.4		14.3	14.3	

Strongly Agree = SA   Agree = A   Undecided = U   Disagree =D   Strongly Disagree = SD

TABLE 5 (Cont.)

Statement	SA	A	U	D	SD
27. A disadvantage of the present EOF (Compensatory) policy guidelines is that some districts may work for weeks or months on a proposal, without any funding, and then in the final analysis be deemed ineligible.	20.8	50.0	20.8	8.3	0.0
	70.8		20.8	8.3	
28. The Department of Education should devise a way to disburse funds in proportion to need which does not require a board to spend money to get money.	37.5	33.3	20.8	4.2	4.2
	70.8		20.8	8.3	
29. Some districts may have pressing needs for compensatory education, but cannot participate in the fund simply because they do not have the time or the personnel capable of writing extensive proposals of the type expected by the Department.	20.8	45.8	20.8	12.5	0.0
	66.7		20.8	12.5	
30. To expect financial support from other local organizations and individuals in a disadvantaged area is unrealistic.	26.1	39.1	13.0	21.7	0.0
	65.2		13.0	21.7	
31. Economic, cultural and social disadvantagement tend to culminate in marked educational disadvantagement, therefore, if you select the educationally disadvantaged, you would target almost the same pupils.	14.3	50.0	14.3	14.3	7.1
	64.3		14.3	21.4	
32. The approval process could be speeded up by allowing district level people to present the proposal verbally in a face-to-face meeting with the policy committee or coordinator of the fund.	4.3	60.9	4.3	13.0	17.4
	62.5		4.3	33.1	
33. The Department could conduct a province-wide needs assessment for compensatory education in order to determine those districts which have the most pressing need for it.	29.2	33.3	20.8	4.2	12.5
	62.5		20.8	16.7	
34. Under the present policy guidelines, economic eligibility for compensatory funding in rural areas is established using per pupil assessment. All districts below $4,000 equalized assessment per pupil are eligible. Districts in this category do not have to document disadvantaged status. This is a positive feature of the guidelines which should be retained.	13.0	47.8	8.7	21.7	8.7
	60.9		8.7	30.4	
35. Local school boards should be expected to contribute a share to the total funding of a project.	4.2	25.0	12.5	33.3	25.0
	29.2		12.5	58.3	
36. Under the present policy guidelines, the EOF will fund new programs, extensions of modifications to existing programs, but will not fund existing expenditures of school boards. This is a positive feature of the Fund.	12.5	45.8	16.7	20.8	4.2
	58.3		16.7	25.0	
37. The government should retain the objectives as a goal statement, but they should devise a way to clearly identify the intended target group.	8.3	50.0	20.8	16.7	4.2
	58.3		20.8	20.8	
38. The feature of the guidelines which allows non-school personnel to submit proposals to school boards is of doubtful value.	7.1	50.0	28.6	0.0	14.3
	57.1		28.6	14.3	
39. The competitive nature of funding under EOF (Compensatory) was definitely a negative feature of the Fund.	14.3	42.9	14.3	28.6	0.0
	57.1		14.3	28.6	

Strongly Agree = SA   Agree = A   Undecided = U   Disagree = D   Strongly Disagree = SD

TABLE 5 (Cont.)

Statement	SA	A	U	D	SD
40. The Department didn't provide clear guidelines for identifying culturally, socially, or environmentally disadvantaged students. Our problem is in defining who those students are.	21.4	35.7	7.1	28.6	7.1
	57.1		7.1	35.7	
41. The terms cultural, social or environmental handicap are undesirable labels which you must really play down or you can stigmatize a group.	16.7	37.5	25.0	16.7	4.2
	54.2		25.0	20.8	
42. Under the present policy guidelines, the EOF will not fund positions which have as their major emphasis planning, administrative, coordinative or organizational activity. This is a positive feature of the Fund and should be retained.	8.3	29.2	8.3	25.0	29.2
	37.5		8.3	54.2	
43. The Department should make more funds available for the evaluation component of compensatory projects.	8.7	43.5	26.1	21.7	0.0
	52.2		26.1	21.7	
44. If you can't write up a proposal to show a need for a service, then I don't think you've got much real need for the money.	14.3	28.6	7.1	21.4	28.6
	42.9		7.1	50.0	
45. I do feel that if compensatory education was funded on a formula basis alone there would be a tendency to feel somewhat lax in identifying needs, specifying objectives, and formulating procedures.	0.0	47.8	30.4	13.0	8.7
	47.8		30.4	21.7	
46. The larger urban systems in Alberta should not be allowed to tap the compensatory fund. They have the tax base and resources and could provide compensatory education without provincial help if they really wanted to.	13.0	26.1	13.0	13.0	34.8
	39.1		13.0	47.8	
47. The outright project grant with no defined maxima or minima is much preferred to the per pupil grants for compensatory education.	9.4	36.4	34.7	14.8	4.7
	45.8		34.7	19.5	
48. As far as the compensatory component of the Educational Opportunities Fund is concerned, a comprehensive system-wide proposal is much preferred to individual school or classroom level proposals.	4.3	34.8	17.4	34.8	8.7
	39.1		17.4	43.5	
49. It became clear to us before long that the compensatory target children were really supposed to be those of native ancestry.	8.3	20.8	29.2	20.8	20.8
	29.2		29.2	41.7	
50. The Department should discontinue funding on the basis of written proposals and move more in the direction of formula funding, but specify the target for the funds to ensure that they go where the government wants them to go, i.e. something like the Library Grant.	2.5	16.7	41.7	20.8	8.3
	29.2		41.7	29.2	

Strongly Agree = SA Agree = A Undecided = U Disagree = D Strongly Disagree = SD

STATEMENT #1

> *"I think the government's insistence on program evaluation is a good idea."*

FINDINGS:

The majority of the respondents agreed with the statement. (100.0%)

DISCUSSION:

Some of those agreeing felt that accountability was even more important for compensatory programs than for regular programs. Others felt that either the evaluation requirement should be made less complex, or that assistance should be provided to carry it out. Some believed that, at the project level, the emphasis in evaluation should be on improving the competencies of professional staffs.

> *The emphasis in evaluation should be staff development; after all, these are not research projects. (P)*
>
> *As long as the evaluation is realistic and will be done. (A)*
>
> *There should be assistance for external evaluation. (A)*
>
> *Accountability is even more important here than in regular programs. Therefore evaluation is a must. (A)*

STATEMENT #2

> *"Parental support for projects is desirable, but should not be a required condition of funding."*

FINDINGS:

The majority of the respondents agreed with the statement. (95.8%)

DISCUSSION:

Those who agreed with the statement felt that, while parental support for a project is desirable, it is often particularly difficult to obtain in a disadvantaged area. By making eligibility for funding dependent upon this type of support, funds may be denied to those areas most in need.

> *One of the reasons for children being "disadvantaged" is parent ignorance and/or disinterest in education. To require their support for funding may serve to perpetuate this situation rather than remedy it. (A)*
>
> *It is often the communities most in need of compensatory that have the most apathetic or alienated parents. (P)*

> *It is difficult to maintain parental support in an area where the mobility is 80 per cent. (B)*

STATEMENT #3

> *"I think it's a desirable objective."*

FINDINGS:

The majority of the respondents agreed with the statement. (95.8%)

DISCUSSION:

Some expressed concern about terms used in the objective and felt that the emphasis should be on educational disadvantagement because, as it stands, the objective implies that pupils who are culturally and socially different are defective and should be "fixed." Others felt that the objective was a "motherhood" type statement and was desirable in a very general sense.

> *The implication is that the students are defective and can be "fixed" to be like average students. (P)*
>
> *It's a desirable objective in a motherhood sense. (A)*
>
> *Depends on interpretation. (A)*

STATEMENT #4

> *"Allowing integrated projects which are administratively separate at the provincial level, but which encompass both the Elementary and Compensatory components of EOP as well as ECS, LDF and others, is a positive feature of the policy guidelines."*

FINDINGS:

The majority of the respondents agreed with the statement. (92.9%)

DISCUSSION:

Respondents agreeing felt that an integrated approach provides the best service. Some felt that project funds should also be integrated at the local level.

> *Our needs could not be met without integration. This policy guideline should be maintained. (P)*
>
> *You can get the best service by a combination. (A)*

> *Integrated projects are desirable but you must also have a flexibility to integrate the funds at the school level. Having to keep the funds separate administratively introduces an element of rigidity which prevents us from accommodating the most serious needs. (P)*

STATEMENT #5

> *"A positive feature of the Fund was that it was for all school pupils in grades one to twelve in all districts eligible for compensatory funding."*

FINDINGS:

The majority of the respondents agreed with the statement. (92.9%)

DISCUSSION:

Most of those agreeing with the statement expressed satisfaction with the flexibility and choice afforded by the expanded scope. However, many also felt that compensatory funds are most effective when used in the lower grades. Others believed that making EOF (Compensatory) available to all students, regardless of grade, was very positive because needs at higher grade levels can be accommodated under current programming.

> *Everyone should have a chance but the funds would probably be best spent in the lower grade levels, in terms of early intervention. (P)*
>
> *Our needs involved students at all grade levels. The government should continue this kind of coverage. (P)*
>
> *Acceptable as long as the decision about which grade level rests with the school division. There's no question that, given the flexibility, the emphasis would be on the lower grades. However, the present scope of the Fund should be maintained to accommodate needs which may be at the higher grade levels. (P)*

STATEMENT #6

> *"While there may be certain disadvantages associated with the funding of compensatory education projects on the basis of approved proposals, overall the written proposal requirement represents a positive feature of the Fund."*

FINDINGS:

The majority of the respondents agreed with the statement. (92.9%)

DISCUSSION:

Those who agreed with the statement felt that a major advantage of the written proposal requirement was that it promoted effective planning. Some saw the amount of time required to meet the expectations of the guidelines as a drawback, but still felt that some form of written proposal requirement should be retained.

> *Written proposals promote effective planning. Perhaps the proposal outlines could be modified to make them less elaborate and more practical. (P)*

> *This forces a system to effectively prepare a program that can be used to help the students. (A)*

Those respondents who disagreed felt that written proposals should play a minor role in funding because they are often written for the benefit of the Department and do not necessarily reflect the needs and intentions of the district.

> *Funding shouldn't be based on written proposals because it's quite easy to give a good "snow job" on paper ~~to~~ get the funds, but in actual practice, once a project is in operation, it might be far removed from what was proposed. (P)*

STATEMENT #7

> *"The Department should not restrict funding to individual school attendance areas. Districts should have the option to submit several school level proposals or one system level proposal or a combination of both."*

FINDINGS:

The majority of the respondents agreed with the statement. (91.7%)

DISCUSSION:

Some of those agreeing felt that having the option of submitting a system level proposal would be desirable because better coordination and leadership would develop and repetition would be avoided. Others felt that this procedure would be more flexible and would allow those at the local level to plan according to needs. Others noted that funding on the basis of school attendance areas assumes that well-defined pockets of disadvantagement can be found and this was not always the case.

> *One unified program will probably receive better coordination and leadership than a number of diverse small projects. (A)*

> *This flexibility would enable a district to plan according to its needs. (A)*

Some school districts do not have well defined "pockets" of disadvantaged students. (S)

STATEMENT #8

"The emphasis in EOF (Compensatory) on the human resource component at the classroom level is a positive feature of the Fund."

FINDINGS:

The majority of the respondents agreed with the statement. (91.3%)

DISCUSSION:

Respondents agreeing with the statement gave a variety of reasons for doing so. Some typical responses follow:

It is the best part of the guidelines. Other funds and local contributions, etc. are too often only for materials. (P)

After all, human resources are our biggest res[illegible]ce. (A)

It's the only thing which can help the child. (P)

"People need people." Technology often interferes or is used as a substitute. (A)

This emphasis builds in a bias or attitude change in professional staff. (S)

Those who were undecided felt that disadvantaged schools need both human and material resources.

Disadvantaged schools need both human and material resources. (S)

STATEMENT #9

"While I am in favour of writing a proposal for the educational program itself, I am not in favour of having to carry out a thorough study documenting disadvantaged status in order to prove to the government that we are a disadvantaged area."

FINDINGS:

The majority agreed with the statement. (91.3%)

DISCUSSION:

Of the respondents who agreed with the statement, many felt that the required documentation had already been done by other governmental and social agencies and that the Department should be able to compile the existing information itself. Some felt that it was extremely difficult for the district to collect objective sociological and cultural data, while others expressed the view that documentation of disadvantaged status was a demeaning process for a district to go through.

> *Most of this work has already been done by urban social services and is documented and available. (B)*

> *It is impossible to obtain objective sociological data. (S)*

> *This process is demeaning to the district personnel. (B)*

Those who disagreed with the statement felt that the government had a right to expect districts to prove their need.

> *Onus should be placed on the requesting organization to prove need. (P)*

STATEMENT #10

"I think it's a good goal statement."

FINDINGS:

The majority of the respondents agreed with the statement. (87.0%)

DISCUSSION:

Some of those agreeing with the statement felt that the government should more clearly define terms such as "equal footing," and "other students." Others felt that the objective was good in that it gave direction without specifying exact procedures. Some indicated that they felt it was a good goal statement for both rural and urban areas.

> *"More equal" (rather than equal footing) might be more accurate. (A)*

> *It should be clarified." For example, what is "equal footing?" Who are "other students?" (P)*

> *It applies as a good goal statement to both rural and urban school systems where there are districts of disadvantaged students. (A)*

Those respondents who disagreed with the statement did so because they felt terms used in the goal statement are vague and required definition.

> *The concept "to provide extra assistance" is good. They need to define "equal footing." "Culturally, socially, and environmentally disadvantaged" are also poorly defined. (P)*

STATEMENT #11

> *"District eligibility for compensatory funding was established using a set of selection criteria based on economic, social, cultural and educational variables. All these variables must be considered to establish which juridictions are eligible for funding."*

FINDINGS:

The majority agreed with the statement. (87.0%)

DISCUSSION:

Those agreeing expressed the feeling that it was necessary to consider all four variables in order to get a total picture of the needs. Others agreed in principle, but felt that educational disadvantagement was the most pertinent criterion; the other three variables were perceived as vague terms which created a nuisance for local school systems. Further, in actual practice, it may not be practical to consider all of these variables, because the greater the number of variables considered, the more complex procedures for establishing eligibility become. The procedures, therefore, become inefficient as well.

> *I agree in principle, but how do you carry it out? Very inefficient! (B)*

> *While the four variables pertain to disadvantagement, perhaps the one which is of greatest concern to educators is educational disadvantagement. (A)*

Respondents disagreeing with the statement either preferred the use of educational data alone, or felt that social, cultural and economic factors were difficult to measure and, at times, inappropriate.

> *How does one specifically evaluate economic status? The specific variables may vary within the community. (P)*

STATEMENT #12

> *"Before expecting extensive and elaborately written proposals, the Department should first of all give approval in principle to a project idea."*

FINDINGS:

The majority of the respondents agreed with the statement. (85.7%)

DISCUSSION:

Respondents agreeing with the statement felt that this procedure would save the districts considerable time, or at least would prevent districts from spending large amounts of time preparing proposals which in the end would be rejected.

It was also felt that following the step in which approval in principle is given, the Department should make its expectations very clear, in order to prevent needless recycling of proposals.

> *It takes considerable time to write a proposal and it would be beneficial to have an indication that your proposal could be accepted. (A)*

> *Approval in principle is a necessary first step, but the Department should then tell us what they expect from the proposal. Under the system used before . . . we had to recycle our proposal several times before it was clear what the government's expectations were. (P)*

Most of the respondents who disagreed felt that this procedure would simply introduce more bureaucratic "red tape" and would not save time.

> *This procedure requires another bureaucratic round and is, I feel, undesirable. We have had experience with this, with ACCESS, and didn't like it as it didn't save any time. (A)*

STATEMENT #13

> *"The split between human and material resources in the funding of a project should be flexible and determined by the nature of the project."*

FINDINGS:

The majority of the respondents agreed with the statement. (85.7%)

DISCUSSION:

Some of those agreeing with the statement felt that the flexibility was desirable because it would allow for changes which might be needed as the program progresses. Others felt that while flexibility was necessary, the emphasis should remain upon human resources.

Flexibility must be a part of any program. There are a number of occasions when mid-program changes are necessary. Lack of flexibility in this area could lead to waste. (P)

Some flexibility would facilitate meeting needs. However, delivery of human educational services should remain an emphasis. (P)

STATEMENT #14

> *"We would prefer to deal directly with the EOF Coordinator instead of the ROE. We are interested in having communication channels with the Department that are clear, open and fast so we can get a quick reply, and I think dealing with the Department enables us to do that."*

FINDINGS:

The majority of the respondents agreed with the statement. (85.7%)

DISCUSSION:

Some of those who agreed with the statement felt that ROE personnel lacked the knowledge to give the assistance which was required by the school districts. Others felt that ROE should be retained for the support services it provides. Generally, it was felt that direct communication with the EOF Coordinator would be very desirable.

Red tape is very frustrating. Hopefully the Department will ensure clear, open and fast communication channels. (P)

Many times, ROE personnel know less than Division staff concerning EOF matters and it is a delay and an inconvenience to operate through them. (P)

Agree, but don't cut out ROE either. ROE has an important role to play too, especially with respect to the support services they can provide. (A)

STATEMENT #15

> *"Concerning the target population for the Fund (culturally, socially and environmentally disadvantaged pupils in grades one to twelve), the Department never clearly made it known how these pupils were to be identified."*

FINDINGS:

The majority of the respondents agreed with the statement. (82.6%)

DISCUSSION:

Those respondents agreeing with the statement felt that the guidelines were unclear and, therefore, not very useful in this regard. Some, however, reported that they could identify the pupils at the local level fairly easily.

> *Student identification criteria were not carefully spelled out. Attendance areas were much better identified. (A)*
>
> *Yes, as compared to whom: city kids? larger urban areas? Unless it is defined who is to get it, then it's wide open to everyone. (A)*
>
> *I think that we all know who these students are, even if the government didn't really make it clear. (A)*

Some of those who disagreed did so because the Department had specified that pupils were to be selected in groups and by area, and identification of individual students on a local level presented no problem.

> *Procedures for targeting individual pupils were not spelled out by the Department as this was left to the local districts. But the Department did specify that the pupils were to be selected in groups and through area disadvantagement either on a school jurisdiction or a school attendance area basis. (S)*

STATEMENT #16

> *"Every proposal should have all costs built into it, including all human and material resources necessary for needs assessment, project planning, implementation, formative evaluation and summative evaluation."*

FINDINGS:

The majority of the respondents agreed with the statement. (82.6%)

DISCUSSION:

Those who agreed that all necessary human and material resources should be built in, offered a variety of reasons and suggestions. Following are some typical responses:

> *Yes, with an error factor built in of 5% or 10% of total submission. (A)*

> *Very much so. Partial funding should be clearly defined as to its part. It is folly not to consider the total costs involved. Partial funding is often questionable. (A)*

> *If you deserve a compensatory component, you can't afford much else at the local level. (A)*

Among those who disagreed were some who felt that it would not be feasible to try and build in these extra costs because it is impossible to anticipate them all. Others disagreed with the statement because they believed that the funds should be kept at the instructional level.

> *Costs change from year to year. Priorities may change with needs. (A)*

> *Our business is to educate . . . only the cost of additional staff should be "extra." (A)*

STATEMENT #17

> *"Excluding the physically, emotionally and mentally handicapped from compensatory funding is a positive feature of the present guidelines."*

FINDINGS:

The majority of the respondents agreed with the statement. (82.6%)

DISCUSSION:

The respondents agreeing that the physically, mentally and emotionally handicapped should be excluded from EOF (Compensatory) did so upon the understanding that other funds would be provided for these groups.

> *Agree, provided Special Education funding is maintained. (S)*

> *As long as adequate funding is provided for the excluded group through other grant structures. (A)*

> *Funds are already available to handle the special education categories. Further, they are a constant percentage of the total population so that you can cope with them on a percentage basis. But in compensatory, you have tremendous ranges and variations from district to district. (S)*

Those disagreeing with the statement felt that it was not always possible to separate the types of handicaps or to distinguish among their various causes.

STATEMENT #18

> *"The point that we wish to make very strongly is that we would like to see some clear definition that would enable us to identify students for compensatory education on the basis of educational data."*

FINDINGS:

The majority of the respondents agreed with the statement. (79.2%)

DISCUSSION:

Some of the respondents who agreed with the statement felt that the school should stay within the bounds of its objectives, which are educational, not social and cultural.

> *Identification must be based on school or systems objectives. (A)*

> *The important thing is to look at student performance, regardless of the cultural background of the student or the language spoken in the home. Efforts in compensatory should be directed towards improving student performance. If you focus on anything else, you'll introduce an unnecessary stigma. (B)*

Some of those who disagreed felt that a clear-cut definition of the target students would take away some of the desirable flexibility. Others felt that standardized tests were not practical for these types of children.

> *Students' needs change. A stringent definition might, in fact, penalize certain students. (A)*

> *Practically impossible with these sorts of children because they cannot take standardized tests. (B)*

STATEMENT #19

> *"Funding of projects in proportion to their nature, size and scope rather than on a fixed per pupil basis is a positive feature of the present policy guidelines."*

FINDINGS:

The majority of the respondents agreed with the statement. (78.6%)

DISCUSSION:

Those who agreed with the statement felt that funding projects in proportion to their nature, size and scope was preferable to funding on a fixed per pupil basis because project funds remain stable regardless of fluctuations in enrollment, and project funding allows more flexibility in placing funds where the greatest needs are.

> *This gives scope to what can be utilized. Student enrollment fluctuations can make a difference. If the enrollment dropped, then the program may not continue. (A)*

> *Project funds are stable and this facilitates long-range planning. (A)*

Those who were undecided felt that there were advantages to both approaches.

> *You can list advantages and disadvantages on either side. (A)*

Respondents who disagreed felt that funding should be on a per pupil basis because project funding encourages school systems to exaggerate needs in order to qualify for maximum funding.

> *Funding should be based on a per pupil allotment because the other encourages a reach-for-the-sky approach. There's a lot of exaggeration that's going on just to get the money. (P)*

STATEMENT #20

> *"Because funds are limited, districts should be told what the ceiling figure is for their jurisdictions before beginning to write a proposal."*

FINDINGS:

The majority of the respondents felt agreed with the statement. (78.6%)

DISCUSSION:

The respondents who agreed with the statement felt that because the funds were limited, the government could have eliminated some of the frustration and inefficient use of time by announcing a ceiling figure of funds available to jurisdictions. While ceiling figures would keep project proposals realistic, some respondents felt they must also be flexible so that they can rise to meet the assessed needs.

It would be a waste of time to write a proposal over the limits allocated to a district. (A)

Agree, but this need not be a firm figure . . . You still want to build in the flexibility to permit funds to rise to the level of the needs assessed. (A)

Those who disagreed with the statement did so because they felt that funds should be granted on the basis of need, and that worthy projects might be discouraged if a ceiling was announced.

Funds should be granted on needs. (B)

It might discourage the most worthy projects. (P)

STATEMENT #21

"The government's objective for EOF (Compensatory) has not been accomplished in our district."

FINDINGS:

The majority of the respondents disagreed with the statement. (78.6% disagreed)

DISCUSSION:

Those who disagreed with the statement felt that the government's objective was definitely in the process of being achieved, and that the fund should be continued so that districts would come closer to the ideal of "equal footing" in education.

We are making great strides in our Division. Much enthusiasm and new effort have resulted. (B)

All our evaluations indicate a strong thrust toward placing students on an equal footing with their peers. (P)

We are accomplishing the objective but funds have to continue. (P)

Some of those who agreed felt that the funds should be continued regardless of the fact that the objectives of the Fund had not yet been accomplished. Others felt that it was an ideal which never could be accomplished. Respondents in this group generally misunderstood that the objective aims toward an ideal.

It gives something to aim at but not accomplish. (A)

The funds should continue so that we can continue to work towards the aim mentioned in the objective. (P)

We could never reach this equal footing thing. (A)

STATEMENT #22

> *"A good feature of the present method of funding compensatory education which calls for written project proposals is that school boards can be held accountable for the funds."*

FINDINGS:

A majority agreed with the statement. (78.3%)

DISCUSSION:

Those agreeing with the statement identified other features of written proposals which they felt to be desirable as well. While some felt that written proposals encouraged accountability and helped to ensure that funds would reach the intended targets, others felt that written proposals themselves did not ensure accountability unless the evaluations are audited by a third party.

> *Written proposals have other good features as well: (a) specifying target areas; (b) specifying program parameters; (c) specifying numerically the extent of disadvantagement; (d) specifying procedures and aims; and, (e) specifying expectations. (P)*
>
> *School boards are accountable for any and all funds. The proposal procedure does not in and of itself ensure accountability. (S)*
>
> *Monitoring of evaluations encourages accountability. (S)*

STATEMENT #23

> *"The preferred method of funding compensatory education is through a combination of project funding and formula funding."*

FINDINGS:

The majority of the respondents agreed with the statement. (73.9%)

DISCUSSION:

Those agreeing with the statement felt that the two methods of funding were not mutually exclusive and, therefore, could be combined to achieve desirable results. However, some respondents felt it necessary

to stipulate that the formula money be spent on compensatory projects, and others agreed on the condition that the formula would not be discriminatory. Such a formula should take into account the unique needs of each district.

> *They are not mutually exclusive, therefore, it could be very desirable to have funds that incorporate both features. (S)*

> *Yes, provided the formula money is spent on compensatory projects. (A)*

> *Agree, provided the formula isn't discriminating . . . The present formula for funding education represents equal treatment of unequals, and it's not just. (S)*

Those who were undecided felt that more information was required. That is, before passing judgment, they would have to know what the formula would be. The respondents who disagreed preferred project funding alone.

> *We're satisfied with present project funding. (B)*

STATEMENT #24

> *"The objective of EOF (Compensatory) is an ideal which can never be accomplished."*

FINDINGS:

The majority of the respondents disagreed with the statement. (73.9%)

DISCUSSION:

Those who disagreed felt that the objective aims at the ideal of equality. It was generally felt that the funds are helping to meet this aim and that gains are being made in the direction of increasing equality of opportunity. Most felt that efforts must continue to be made, regardless of whether being "equal with other students" was actually in sight for all.

> *Perfection, no! Gain, yes! The need for help is real and it is very important that help be provided. (A)*

> *It is not an ideal, it is aiming at an ideal. It proposes increments towards an ideal of equality and this is good. (B)*

> *There is no question that the funds provided are assisting disadvantaged students to aim at being on an equal footing with other students . . . the key word in the objective is the word "aim." (A)*

Of the minority of respondents who agreed with the statement, many felt that it was nevertheless important that efforts continue to be made in compensatory education. Others felt that the aim was much too broad and that the goal statement was laden with value assumptions.

> *It's a good thing to attempt, even though it may be somewhat idealistic. (S)*

> *It is much too broad an aim, and it assumes that "other students' footing" is where all students should be - value laden! (P)*

STATEMENT #25

> *"The Department should move compensatory education from a three year project cycle into a five year cycle."*

FINDINGS:

The majority of the respondents agreed with the statement. (71.4%)

DISCUSSION:

The respondents who agreed with the statement felt that a longer project cycle would add security to the projects and would allow for long-range planning. Some felt the projects should be on-going, with periodic evaluations. Others felt that compensatory education results are best evaluated after a longer period of time; therefore, results achieved after a five year project term would give a better indication of the project's success than would an evaluation after a three year term.

> *Compensatory programs should be on-going with perhaps some evaluation and re-direction every three to five years. (P)*

> *Long-range planning is more efficient and effective, in my opinion. (P)*

> *In "culturally, socially and environmentally disadvantaged" areas, it takes a long time to achieve a little and a longer time to achieve a lot. (P)*

Those who disagreed with the statement expressed satisfaction with the present three year cycle. Some preferred the three year term because it did not commit a school system to a project which might turn out to be ineffective. However, others felt that the government should provide some assurance that funds would continue after the end of the three year cycle.

> *The three year cycle is preferred, provided the government would do something to assure that funds will continue at the*

> *end of the three year period. This does not mean that a specific project would continue beyond three years in its present form, as after three years there would no doubt be extensive need for modification. (P)*

STATEMENT #26

> *"While funding of compensatory education on the basis of Department approved proposals has certain disadvantages, it is much preferred to formula funding."*

FINDINGS:

The majority of the respondents agreed with the statement. (71.4% agreed)

DISCUSSION:

Those in agreement with the statement felt that an advantage of project funding over formula funding is that the funds reach the intended targets and are not drained off into other areas. Some also felt that project grant funding results in better planning. Others believed that project grants allow for more flexibility and change.

> *Project funding keeps the Fund with the projects and doesn't allow it to be syphoned off into other areas. (A)*

> *Project grant funding introduces an element of flexibility which formula funding does not have. (A)*

Respondents disagreeing felt that, in a proposal some may tend to propose anything just to get the funds, whereas formula funding guarantees that the funds reach the area of the province greatest in need.

> *In proposals you can say anything you want to. Formula funding is more logical because local people can put the money where it's most needed. (P)*

STATEMENT #27

> *"A disadvantage of the present EOF (Compensatory) policy guidelines is that some districts may work for weeks or months on a proposal, without any funding, and then in the final analysis be deemed ineligible."*

FINDINGS:

The majority of the respondents agreed with the statement. (70.8%)

DISCUSSION:

Those who agreed with the statement expressed the concern that resources expended in setting forth an elaborate proposal, which is not approved, are not recoverable. Suggestions offered were that there should be tentative approval of brief proposals before a lot of work goes into developing elaborate ones, and that the government should identify the areas which need and will receive funds, and then have the school systems prepare proposals showing how the funds will be spent.

> *The government should identify the jurisdictions in the province which need the funds . . . the school system would then come up with some kind of proposal to demonstrate how the funds would be spent. (A)*

> *Requesting a brief proposal initially would assist in this problem. (A)*

The respondents who disagreed with the statement stated that they had received all the funds they had asked for, and therefore had no experience with this problem.

> *We have no information about what happened in other districts. It wasn't the case here. (A)*

Of those who were undecided, some stated that they had not found this to be a disadvantage. Others suggested that approval of tentative proposal outlines might solve the problem.

> *Perhaps there should be approval of a tentative outline, but work should go into a proposal before it is presented to the government. Carrying out a needs assessment and developing a proposal is an indication of commitment. (A)*

STATEMENT #28

> *"The Department of Education should devise a way to disburse funds in proportion to need which does not require a board to spend money to get money."*

FINDINGS:

The majority agreed with the statement. (70.8%)

DISCUSSION:

Of the respondents agreeing with the statement, some felt that the Department should provide 'front-end' money for needs assessment, and expressed the concern that needy districts, whose budgets are already strained, are not able to use any of their scarce resources "chasing dollars."

> *Seems obvious. The benefit of funding is diminished. The acquisition of such funds places further financial commitments on already strained budgets. (P)*

> *There should be more front-end money for proposal writing. (P)*

Among those undecided were some who felt that the Department had to assume some responsibility for needs assessment, but that perhaps a joint approach where local and provincial personnel would work together is preferred.

> *Some needs should be determined locally, but the Department does bear some responsibility in this regard. Perhaps a joint approach is preferred, with the Department and the local people both involved in needs assessment. Then the principle of funding in proportion to need could be applied. (P)*

STATEMENT #29

> *"Some districts may have pressing needs for compensatory education, but cannot participate in the Fund simply because they do not have the time or the personnel capable of writing extensive proposals of the type expected by the Department."*

FINDINGS:

The majority of the respondents agreed with the statement. (66.7%)

DISCUSSION:

Several suggestions were made by those agreeing with the statement. Some felt that the proposal guidelines should be modified and made precise so expectations would be clear. Others suggested that the Department provide a standard blank form with space to fill in the required information. Some felt that a face-to-face meeting between representatives of the local districts and the Department to discuss proposed plans would facilitate the approval process. Others suggested that funds be provided for planning and that the Department should do more work to identify needy areas so that funds could be guaranteed to those districts most in need.

> *Modified and precise guidelines would simplify writing the proposals. (B)*

> *It would seem more appropriate if a representative met with the consultant and discussed what was done and has to be done. (B)*

> *Thus, funding or assistance for surveys and proposal development should be part of the Fund. (A)*

Of those who were undecided, some felt that the case in the statement might possibly be true, and if so, the government should make funds available for the planning activities in districts which need them. Others suggested that the Department sponsor in-service programs to improve skills relative to project development, implementation and evaluation.

> *If this is the case, then the Department of Education should make funds available for these activities. (P)*

> *Provide in-service to improve planning and evaluation skills. (A)*

Those disagreeing understood that the Regional Office personnel would assist in this area when needed.

> *According to the guidelines, the Department Regional Office would assist. (B)*

STATEMENT #30

> *"To expect financial support from other local organizations and individuals in a disadvantaged area is unrealistic."*

FINDINGS:

The majority of the respondents agreed with the statement. (65.2%)

DISCUSSION:

Some of those agreeing felt that non-financial support might be a more realistic expectation. Others believed that funds were actually there, and needed only to be tapped in some ideal way. Generally, it was felt that financial support may be possible and/or desirable, but it should not be required from a disadvantaged area.

> *Support, other than financial, might be realistic, for example - community work, etc. (P)*

> *Instead of financial support, stress should be more on decision-making support - communities and parents more involved. It may take time, but it's going to happen. (P)*

Those who disagreed felt that some financial support was not an unrealistic expectation. Some respondents saw no reason why disadvantaged parents could not conduct fund raising activities. Others cited the emergence of cooperatives in disadvantaged areas as evidence that financial support could be obtained.

> *How much financial support? The emergence of cooperatives in deprived areas argues against this statement. Should expect support, but may not always get it. (A)*

> *I see no reason why disadvantaged parents could not conduct fund raising efforts. (P)*

STATEMENT #31

> *"Economic, cultural and social disadvantagement tend to culminate in marked educational disadvantagement, therefore, if you select the educationally disadvantaged, you would target almost the same pupils."*

FINDINGS:

The majority of the respondents agreed with the statement. (64.3%)

DISCUSSION:

Respondents agreeing with the statement felt that, although it was largely true, there were some exceptions. Most believed that selection of target groups should be done on the basis of educational criteria. Some believed that other factors operate which must be considered as well.

> *This is largely ture . . . you could select the educationally disadvantaged and target almost the same group. If the Department moved in the direction of educational disadvantagement, it would considerably clarify the guidelines for identifying the target groups. (A)*

> *Our original proposal cited research results. Although distinctions can be made, there appears to be agreement that many culturally or environmentally deprived children are educationally retarded or have learning disorders. (P)*

The respondents who disagreed felt that, while a relationship might exist, there was not a complete parallel between educational disadvantagement and social, cultural and economic disadvantagement.

> *You would probably select about two-thirds of the students using educational data alone. (P)*

> *There is not a complete parallel between the two . . . Schools should try to concentrate on the educational element, but there is no sharp line. (A)*

STATEMENT #32

> *"The approval process could be speeded up by allowing district-level personnel to present a proposal verbally in a face-to-face meeting with the policy committee or coordinator of the Fund."*

FINDINGS:

The majority of the respondents agreed with the statement. (62.5%)

DISCUSSION:

Of those agreeing with the statement, some felt that the communication provided by such a meeting would help school personnel interpret any "jargon" used by the Department, and identify ineligible proposals before a lot of work had gone into them. Some felt that a combination of written and verbal evidence would be desirable, while others felt the district should have the choice between written and verbal presentation.

> *Sometimes the Department of Education 'jargonese' required considerable interpretation. More than once I thought that face-to-face meetings might have speeded up the approval process. (A)*

> *A combination of face-to-face presentation and a less formal written proposal is preferred. (S)*

Of those who disagreed, most felt that the presentation of written proposals was desirable and necessary. Some doubted that the suggested face-to-face meeting would speed up the approval process.

> *A written proposal . . . serves to clarify thinking, and is less likely to be misinterpreted. It is doubtful that the meeting would speed anything up. (A)*

> *I realize that proposals are a bureaucratic process, but I still think that if a proposal is to be done properly, it must be written. (A)*

STATEMENT #33

> *"The Department should conduct a province-wide needs assessment for compensatory education in order to determine those districts which have pressing need for it."*

FINDINGS:

The majority of the respondents agreed with the statement. (62.5%)

DISCUSSION:

Those who agreed felt that there was a need for better leadership from the Department in this regard and that the preferred way to approach such a task would be through a cooperative effort between the local school district and the Department or other external agency appointed specifically for that purpose. Some felt that the required data was already available and perhaps all that was needed was to compile existing information. Others mentioned that a province-wide needs assessment would ensure that the areas needing help would get it, would enable the Department to commit funding to certain areas, and would eliminate the competitive aspect of current procedures. However, some mentioned that such an assessment might result in a formula which would destroy current flexibility.

> *Agree, provided the Department recognizes the need for local input. (S)*

> *This would eliminate, to a large extent, the need to compete for funds and save a lot of time and money spent establishing and proving need. (A)*

Respondents disagreeing with this statement felt that needs assessment was a local responsibility, while Department responsibility was to respond to locally demonstrated need.

> *The Department should let districts do their own needs assessment. Don't they trust us? (P)*

STATEMENT #34

> *"Under the present policy guidelines, economic eligibility for compensatory funding in rural areas is established using per pupil assessment. All districts below $4,000 equalized assessment per pupil are eligible. Districts in this category do not have to document disadvantaged status. This is a positive feature of the guidelines which should be retained."*

FINDINGS:

The majority of the respondents agreed with the statement. (60.9%)

DISCUSSION:

Those agreeing generally felt that excluding the districts which do not have the resources to conduct a thorough needs assessment in order to document disadvantagement was a fair practice. Several respondents suggested that, as a guideline or a proxy indicator of need, equalized assessments per pupil was acceptable, but that in all cases the principle of "special consideration for special circumstances" should apply.

Others felt that other indicators, such as income data, should be included.

> *Agree. However, it should include other indices such as property assessment, annual incomes, etc. (A)*

> *It's a good proxy indicator. (S)*

> *However, much more is involved than this. Formula could be based on tax bases. (S)*

> *Guidelines are guidelines. Special consideration should be given to special needs. (S)*

Some mentioned that they would oppose the use of equalized assessment as the sole criterion of need as it would discriminate against disadvantaged children who live in the richer districts by denying them the opportunity to compensatory help.

> *It doesn't get at all students who are culturally, socially or environmentally disadvantaged. (P)*

STATEMENT #35

> *"Local school boards should be expected to contribute a share to the total funding of a project."*

FINDINGS:

The majority of the respondents disagreed with the statement. (58.3%)

DISCUSSION:

Some of those respondents who disagreed with the statement felt that such a requirement would be inconsistent with the Fund's objective because it would place the more affluent districts in a preferred position for funding. The systems with the greatest needs cannot afford to put funds into extra projects. Some felt that the projects placed enough of a financial strain on systems already because of the non-funded planning and administration activities required. Others felt that boards that could afford to contribute a share should be required to do so.

> *Given the objective and tight budget, this is impossible. (A)*

> *If extra funding is required because school districts cannot meet the needs, then it is not appropriate to require even a partial contribution. (S)*

> *Some boards cannot afford a contribution. Such a requirement would guarantee that the more affluent get more grants. (B)*

> *If this is to be a guideline, I disagree. Boards' contributions should depend on their ability to contribute. In some cases, they would not be able to without deterioration of the regular program. (P)*

Some reasons respondents gave for agreeing with the statement were that the local boards would feel involved and would have more control over the programs if they contributed to the Fund. Others felt that a board's contribution should be in terms of time, facilities and equipment.

> *The ratio should be not more than 10% board contribution. Some contribution gives local boards control over the type of program that can be implemented. (A)*

> *Particularly in terms of time, facilities and equipment. (A)*

STATEMENT #36

> *"Under the present policy guidelines, the EOF will fund new programs extensions or modifications to existing programs, but will not fund existing expenditures of school boards. This is a positive feature of the Fund."*

FINDINGS:

The majority of the respondents agreed with the statement. (58.3%)

DISCUSSION:

Those agreeing felt that the guideline was necessary in order to ensure that the funds were used in the specified needy areas. Further, the whole idea behind compensatory is to provide service above and beyond that provided by the regular program.

> *This, I feel, is a must in order that the funds are used for the specified programs. Misuse of funds would be prevented. A good guideline. (A)*

> *The funding is meant to assist in special areas, otherwise it would defeat the intent. (B)*

> *Compensatory should provide something above and beyond what is currently being done. (A)*

Those who disagreed felt that excluding present programs from the Fund was an undesirable feature of the guidelines because the districts which already have sound compensatory programs in operation are being penalized.

> *This is a negative feature of the Fund. Any district that has already established sound programs should not have to scramble around to find new and perhaps less defensible projects just to get money. (S)*

> *May discriminate against progressive boards. (P)*

STATEMENT #37

> *"The government should retain the objective as a goal statement, but it should devise a way to clearly identify the intended target group."*

FINDINGS:

The majority of the respondents agreed with the statement. (58.3%)

DISCUSSION:

Of those who agreed with the statement, some felt that the government should clearly identify the target areas by using objective social, cultural or economic data from sources outside the local district. However, the findings were somewhat equivocal because most respondents stated that they agreed with the first part of the statement, but felt target pupils should still be determined locally using educational data.

> *Local schools and teaching teams are the ones to identify target groups. (B)*

> *It is a good statement in that it points in a direction that we should be going and it is a valid goal. As far as identifying the target groups is concerned, it's best to use methods which are as unobtrusive as possible. The present procedure which uses the tax base is a fairly reliable indicator and could perhaps be used with some form of academic performance indicator. (P)*

Some of those who disagreed also felt that the target pupils should be determined locally. Others felt that the target groups would resent being labelled "socially,culturally, and environmentally disadvantaged" by the government.

> *This should be left to the local district. (A)*

> *A disadvantaged group does not appreciate being identified as such, especially by the government. (P)*

STATEMENT #38

> *"The feature of the guidelines which allows non-school personnel to submit proposals to school boards is of doubtful value."*

FINDINGS:

The majority agreed with the statement. (57.1%)

DISCUSSION:

Respondents agreeing with the statement felt that the school professionals are in the best position to evaluate and determine childrens' educational needs. Some also felt that non-school personnel would be wasting their time on proposal writing, as the school personnel themselves have enough trouble preparing a proposal and getting it approved.

> *The professional is in the best position to determine what assistance should be given. (A)*

> *I think the non-school personnel would be wasting their time . . . Unless they had a lot of support and a lot of help, they would end up with a proposal that was not acceptable. (S)*

> *. . . Surely professional educators should be the ones to deal with school proposals. (P)*

Those who were undecided, felt that there was not enough information provided about this feature in the guidelines.

> *What does the government expect here? This needs more elaboration in the guidelines. (P)*

The respondents who disagreed with the statement felt that non-school personnel have worthy ideas and they should be encouraged to express these ideas and to help put them into practice.

> *The community has good ideas and they should be encouraged to put these ideas in writing and to present them to the school officials. However, perhaps the ideal would be to have school-community cooperation in these ventures. (P)*

STATEMENT #39

> *"The competitive nature of funding under EOF (Compensatory) was definitely a negative feature of the Fund."*

FINDINGS:

The majority agreed with the statement. (57.1%)

DISCUSSION:

Respondents agreeing felt that competition for funds was undesirable because districts which are able to prepare the best proposals may not be the ones in greatest need of funds. Areas having the largest backup of human and financial resources are believed to be at an advantage in competitions.

> *We were fortunate in the competition, but how many areas which should be benefiting are not? (P)*
>
> *I feel funds were allotted on the basis of "stacked" proposals rather than actual needs. (P)*

Those who disagreed with the statement indicated that they saw nothing wrong with the competitive aspect of the funding and that they felt the competition was fair to all concerned.

> *Competition is desirable because at least everyone has an opportunity to present their case for funding. (P)*

STATEMENT #40

> *"The Department didn't provide clear guidelines for identifying culturally, socially or environmentally disadvantaged students. Our problem is in defining who those students are."*

FINDINGS:

The majority of the respondents agreed with the statement. (57.1%)

DISCUSSION:

Of those who agreed, many felt that while the lack of a clear definition of the target group was a disadvantage of the initial guidelines, there was little problem identifying the disadvantaged students at the local level.

Some felt that the Department should leave the selection of the target group to local personnel.

> *However, I feel that I am able to define in my mind "disadvantaged" students and hence went ahead and applied for assistance. (P)*

> *We have no difficulty in defining who those students are and furthermore, the selection of the specific target population should be the prerogative of the local people. But, terms like "culturally, socially and environmentally disadvantaged" are nebulous terms which may escape definition anyway. (P)*

Those respondents who disagreed felt that the guidelines had adequately defined the target group or they reported no problem in this regard.

> *I believe we did a good job at this on our own. The only problem encountered was that the process was extremely time-consuming. (P)*

> *The guidelines were adequate. (P)*

STATEMENT #41

> *"The terms cultural, social or environmental handicap are undesirable labels which you must really play down or you can stigmatize a group."*

FINDINGS:

The majority of the respondents agreed with the statement. (54.2%)

DISCUSSION:

Many of those who agreed with the statement felt that educational factors should be used to identify the target population. This would eliminate the need for the other, more stigmatizing labels.

Some felt that the terms, if used at all, must be handled very carefully. If used publically, they could do a lot of damage.

> *Educational factors should be used to identify students since these are the ones the school has some power of manipulation over. (P)*

> *There are some very proud, poor families and you can do a lot of damage if you imply such things. (S)*

> *Such labels would not be necessary if the Department focused on educational handicaps; that is, the deficiencies of students in terms of educational performance. (A)*

Those who disagreed felt that these terms help in the identification of target groups and should continue to be used.

Some people react negatively to such terms. However, a need must be described. (P)

If handled right, they are helping terms. (P)

STATEMENT #42

> *"Under the present policy guidelines, the EOF will not fund positions which have as their major emphasis planning, administrative, coordinative, or organizational activity. This is a positive feature of the Fund and should be retained."*

FINDINGS:

The majority of the respondents disagreed with the statement. (54.2%)

DISCUSSION:

Respondents disagreeing with the present policy gave a number of reasons for their views: money is wasted when projects are not thoroughly planned and coordinated; every additional project places a strain on the existing administration; projects are forced to exist as small, uncoordinated efforts; regular programs suffer from extra work load.

There are certain types of highly desirable programs which do not require additional teaching staff, but a re-deployment of existing staff through coordination. (A)

Agree with the emphasis, but do need some for planning, administration, etc. activities. (A)

Every additional project is an added strain on the present administration. Thus, some recognition must be given here. (S)

Those who agreed that EOF should not fund planning, administrative, coordinative or organizational activities were pleased that the funds were aimed directly at the instructional level and, therefore, were directly affecting the target students.

Right! Keep the action at the school and classroom level. (P)

STATEMENT #43

> *"The Department should make more funds available for the evaluation component of compensatory projects."*

FINDINGS:

The majority of the respondents agreed with the statement. (52.2%)

DISCUSSION:

Those agreeing with the statement felt that, while the evaluation of public education programs should be done thoroughly, it should not place a strain upon the regular program budget, nor should it draw funds away from the instructional component of a project. Some felt that funds made available for the evaluation of projects would bring returns in terms of instructional improvement.

> *More funds should be made available in the evaluation component, but these dollars should show up in terms of greater assistance to the teacher and the learner. (A)*
>
> *There is definitely a need for evaluation but this should not draw funds away from the instructional component. (S)*
>
> *Too much evaluation is expected at the school district's expense. (S)*

Those respondents who disagreed felt that the funds which might be made available for evaluation would be better spent on the actual projects.

> *We sometimes spend too much time "studying" and "analyzing" and not enough time "doing." (B)*

STATEMENT #44

> *"If you can't write up a proposal to show a need for a service, then I don't think you've got much real need for the money."*

FINDINGS:

Opinion was divided on this statement with 42.9% of the respondents agreeing and 50.0% disagreeing.

DISCUSSION:

Those who disagreed felt that a district may have serious needs, but may not have personnel with the expertise or the time to write an impressive proposal.

> *You may have very serious needs, but the district may not have the expertise or the personnel necessary to write the proposal. (P)*

> *If a person can't write a proposal it may simply mean that he has no proposal writing skills, but it certainly doesn't mean that he doesn't have a need for the money. (A)*

Others agreed in principle, but felt that the Department should provide funds for proposal writing, especially to areas which do not have the staff available with the time and expertise required.

> *I strongly agree with this statement in principle. However, I think that consideration must be given to the fact that most rural areas don't have the people power to write the proposals to demonstrate needs. (P)*

STATEMENT #45

> *"I do feel that if compensatory education was funded on a formula basis alone there would be a tendency to feel somewhat lax in identifying needs, specifying objectives, and formulating procedures."*

FINDINGS:

While there was no clear majority of opinion regarding statement forty-five, the predominant response was in the affirmative with 47.8% agreeing.

DISCUSSION:

Of those who agreed with the statement, some believed there was a need to consider other factors as well which affect the amount of planning done by a district.

> *True. There are other factors as well, not the least of which is local initiative and desire for self-improvement. (S)*

The respondents who disagreed or were undecided felt that formula funding alone did not necessarily lead to lax planning and that identifying needs, specifying objectives and formulating procedures could be required under formula funding, especially if the Department placed more emphasis on accountability.

> *This can happen, admittedly. However, it isn't always this way and the Department can still monitor where the money goes. (A)*

STATEMENT #46

> *"The larger urban systems in Alberta should not be allowed to tap the compensatory fund. They have the tax base and resources and could provide compensatory education without provincial help if they really wanted to."*

FINDINGS:

No majority of opinion emerged in response to the statement. (47.8% disagreed, 39.1% agreed)

DISCUSSION:

The respondents who disagreed with the statement felt that urban systems have at least their share of disadvantaged pupils. Some felt that, in cities, different kinds of deprivation exist which must be considered. Others believed that, if "disadvantagement" was clearly defined, the rural areas would receive most of the funds.

> *The reverse is the case. The large urban centres attract those in greatest need and carry a disproportionate load. (B)*

> *If the concept of disadvantagement were clearly defined, the rural areas would get most of the money. (S)*

> *There are city children who are as, if not more, deprived than disadvantaged rural children. Simply a different kind of deprivation - perhaps more serious. (P)*

Those who agreed with the statement made comments such as the following:

> *Urban areas are more exposed to facilities and possibly qualified volunteer help. (P)*

> *Rural areas are much more disadvantaged. (A)*

> *We have such a low tax base.*

> *This gets into a lot of politics. (S)*

> *It's a comment that stems from lack of appreciation for the problems of the cities. (A)*

STATEMENT #47

> *"The outright project grant with no defined maxima or minima is much preferred to the per pupil grants for compensatory education."*

FINDINGS:

There was no majority of opinion regarding statement forty-seven. More respondents agreed with the statement than disagreed or were undecided. (45.8% agreed)

DISCUSSION:

The respondents who agreed with the statement felt that outright project grant funding was more flexible and more suitable for a compensatory program because it allowed for funding in proportion to the severity of need in an area.

It was believed that per pupul funding would place most of the funds in the urban areas, while the rural areas may actually have the greatest needs.

> *This is imperative if the objective of EOF (Compensatory) is to be realized. (A)*

> *Compensatory should allow for inequalities untouched by mathematical formulae. (A)*

> *Funds should go where there is greatest need. A per pupil grant restricts that flexibility. (P)*

Those who were undecided felt that there were advantages to both types of funding.

> *There are advantages on both sides. The outright pupil grant is more convenient, it's simpler and you know what you're getting, therefore, planning is easier. However, the outright project grant builds in more stability. (P)*

Respondents who disagreed with the statement preferred to have some limits set on the funding.

> *There have to be limitations. Districts have to know where they're at, and what the ceiling figure is. (A)*

STATEMENT #48

> *"As far as the compensatory component of the Educational Opportunities Fund is concerned, a comprehensive system-wide proposal is much preferred to individual school or classroom level proposals."*

FINDINGS:

No clear majority of opinion emerged regarding this statement. More respondents disagreed with the statement than agreed or were undecided. (43.5% disagreed).

DISCUSSION:

The respondents who disagreed felt that individual or classroom level proposals were much preferable to system-wide proposals. Most felt that classroom level projects reflect the unique situations and needs of a school. A concern was expressed for keeping the projects at a grass-roots level. Others expressed the view that it was desirable to keep projects at the local school level so that the personnel who planned them would also be directly involved in running them, thereby building in commitment.

> *One of the best aspects of this has been the fact that individual schools can make submissions, thereby asserting their own individuality and reflecting the specific needs of the community served by them. (A)*
>
> *A program works much better if the personnel directly involved are committed to it. (P)*

Some reasons that respondents gave for agreeing with the statement were that a comprehensive system-wide proposal would develop better leadership and cooperation, that it would allow for better control and supervision of projects, and it would encourage systems to make a concerted effort to develop compensatory education programs.

> *Gives better leadership and coordination. Otherwise there is too much work for individual principals. (B)*
>
> *Provides for a concerted effort on a system-wide basis. (S)*

STATEMENT #49

> *"It became clear to us before long that the compensatory target children were really supposed to be those of native ancestry."*

FINDINGS:

There was no clear majority of opinion regarding statement forty-nine. More respondents disagreed with the statement than agreed or were undecided. (41.7% disagreed)

DISCUSSION:

Those who disagreed were unaware of such a policy and felt that all disadvantaged children, regardless of ethnic origin, qualified for compensatory education under EOF.

> *We have children in the special programs from all ethnic groups. (B)*

I've never heard that said. (P)

Those respondents agreeing with the statement gave comments such as the following:

Unfortunate, but seemingly true. (P)

It didn't just become clear - we were told that. (P)

Experience with this fund led us to make this assumption, and it was verified through efforts to get such funds. (A)

STATEMENT #50

> *"The Department should discontinue funding on the basis of written proposals and move more in the direction of formula funding, but specify the target for the funds to ensure that they go where the government wants them to go, i.e. something like the Library Grant."*

FINDINGS:

There was no majority of opinion regarding statement fifty. More respondents were undecided than were either in agreement or disagreement with the statement. (41.7% undecided)

DISCUSSION:

Those persons selecting the undecided category did so on the basis of lack of knowledge and offered no explanatory comments. Of those who agreed with the statement, some suggested that a form of written proposal be retained in the requirements. Others stated that the formula would have to take into account the individual characteristics and needs of a jurisdiction.

Agree, but at least retain a simplified checklist type proposal. A simplified proposal should retain an evaluation component. (S)

Agree, provided the formula devised gives recognition to the needs of individual jurisdictions. (A)

Some of the disagreeing respondents felt that written proposals were absolutely necessary. Others felt that with formula funding, some of the desirable local-level flexibility would be lost, and that local needs would not be met.

Formula funding will not meet the needs. Project funds will vary in terms of deficits, not in terms of student numbers. Proposal writing is a necessary part of getting a real handle on things. (A)

SUMMARY

The results obtained from mail questionnaires and telephone interviews are summarized below. The statement presented in italics is a direct quotation from the interview data, reported in Section V. The reactions of school superintendents, deputy and assistant superintendents, project supervisors and school board members follow the quotation. The figures in parentheses reveal the percentage of the respondents agreeing or disagreeing with the quotation. A summary of their comments is also presented.

1. *"The government's insistence on program evaluation is a good idea." (100.0% agree)*

Evaluation is necessary for accountability, but the Department's expectations for complex evaluations may be unrealistic. If the Department's expectations are not lowered, assistance should be provided to carry out evaluations.

2. *"Parental support for projects is desirable, but should not be a required condition of funding." (95.8% agree)*

Parental support for projects is often particularly difficult to obtain in a disadvantaged area; therefore, by making eligibility for funding dependent upon this type of support, funds may be denied to those areas most in need of them.

3. *"The objective of EOF (Compensatory) is 'a desirable objective'." (95.8% agree)*

Since the statement is a general one, its desirability may depend upon its interpretation. The objective would be less value laden if the emphasis was placed upon educational disadvantagement rather than social and cultural differences or environmental disadvantagement.

4. *"Allowing integrated projects which are administratively separate at the provincial level, but which encompass both the Elementary and Compensatory components of EOF as well as ECS, LDF and others, is a positive feature of the policy guidelines." (92.9% agree)*

Such an integrated approach provides the best service. Allowing local districts to also integrate funds at the local level may be desirable as well.

5. *"A positive feature of the Fund was that it was for all school pupils in grades one to twelve in all districts eligible for compensatory funding." (92.9% agree)*

The expanded scope gives districts the flexibility to concentrate funds on the areas of greatest need and to accommodate needs at every grade level. For compensatory funds to be used most effectively, however, they should perhaps be concentrated on the lower grade levels.

6. *"While there may be certain disadvantages associated with the funding of compensatory education projects on the basis of approved proposals, generally the written proposal requirement represents a positive feature of the Fund." (92.9% agree)*

Written proposals have the drawback of being very time-consuming to prepare, but this requirement should be retained because it promotes effective planning.

7. *"The Department should not restrict funding to individual school attendance areas. Districts should have the option to submit several school level proposals or one system level proposal or a combination of both." (91.7% agree)*

Having the option of submitting a system level proposal would be desirable because better coordination and leadership would develop and repetition would be avoided. Funding on the basis of school attendance areas wrongly assumes that one will always find pockets of disadvantagement within the boundaries of school jurisdictions.

8. *"The emphasis in EOF (Compensatory) on the human resource component at the classroom level is a positive feature of the Fund." (91.3% agree)*

Children in compensatory programs will benefit most from help provided directly by the human resource component. Material resources are also important, however, and the Department should provide adequate funds for this component where needs warrant this type of support.

9. *"While I am in favour of writing a proposal for the educational program itself, I am not in favour of having to carry out a thorough study, documenting disadvantaged status in order to prove to the government that we are a disadvantaged area." (91.3% agree)*

The required documentary evidence may already be available from other governmental and social agencies, and all that may be needed is for the Department to compile such data. It is extremely difficult for a district to collect objective sociological and cultural data from local sources. Further, such an activity is a demeaning process for local district people to go through.

10. *"The objective of EOF (Compensatory) is 'a good goal statement'." (87.0% agree)*

There is a need, however, to define terms such as 'equal footing' and 'other students' more clearly. It is a good goal statement because it gives direction without specifying exact procedures.

11. *". . . (Economic, social, cultural and educational variables) must be considered when attempting to establish which jurisdictions are eligible for funding." (87.0% agree)*

While one cannot quarrel with the statement in principle, in actual practice, difficulties may arise as the more variables considered, the more complex needs assessment procedures become. Establishing district eligibility on the basis of all four variables is very inefficient. Educational disadvantagement may be the most pertinent criterion of the four mentioned.

12. *"Before expecting extensive and elaborately written proposals, the Department should, first of all, give approval in principle to a project idea." (85.7% agree)*

This procedure would help to prevent districts from spending large amounts of time preparing proposals which, in the end, are rejected. After the Department gives approval in principle to a project, it should make its expectations very clear, in order to prevent needless recycling of proposals.

13. *"The split between human and material resources in the funding of a project should be flexible and determined by the nature of the project." (85.7% agree)*

This flexibility would be desirable because it would allow for changes which may be needed as the project progresses. However, delivery of human educational services should remain an emphasis.

14. *"We would prefer to deal directly with the EOF Coordinator instead of the ROE. We are interested in having communication channels with the Department that are clear, open and fast so we can get a quick reply, and I think dealing with the Department enables us to do that." (85.7% agree)*

The ROE are not always able to give districts the information they need, and to operate through them introduces delays and inconvenience. Nevertheless, ROE should be retained as they provide good support services for compensatory projects.

15. *"Concerning the target population for the Fund (culturally, socially and environmentally disadvantaged pupils in grades one to twelve), the Department never clearly made known how these pupils were to be identified. (82.6% agree)*

The Department did specify that the pupils were to be selected in groups and through area disadvantagement, either on a school jurisdiction or school attendance area basis. Procedures for targeting individual pupils were not spelled out by the Department as this was left to the local districts.

16. *"Every proposal should have all costs built into it, including all human and material resources necessary for needs assessment, project planning, implementation, formative evaluation and summative evaluation." (82.6% agree)*

Districts which are eligible for compensatory aid cannot normally afford to supply the extra planning costs which, under the present setup, must come from the local school system. As it may be difficult to anticipate all extra costs and include them in a proposal, an error factor of 5% to 10% of the total submission should be built in.

17. *"Excluding the physically, emotionally and mentally handicapped from compensatory funding is a positive feature of the present guidelines." (82.6% agree)*

As long as children with these handicaps are provided with adequate programs through other funding sources, it is fair to omit them from compensatory funding.

18. *"The point that we wish to make very strongly is that we would like to see some clear definition that would enable us to identify students for compensatory education on the basis of educational data." (79.2% agree)*

The school should stay within the bounds of its objectives and concentrate on improving student performance. Focusing on social, cultural and environmental variables introduces an unnecessary stigma.

19. *"Funding of projects in proportion to their nature, size and scope, rather than on a fixed per pupil basis, is a positive feature of the present policy guidelines." (78.6% agree)*

Project funding is more stable than funding based on pupil enrollments as the amount available does not change with fluctuations in the student population. It also allows more flexibility in targeting funds to the areas in greatest need.

20. *"Because funds are limited, districts should be told what the ceiling figure is for their jurisdictions before beginning to write a proposal." (78.6% agree)*

This would eliminate some of the frustration and inefficient use of time which resulted under the present system. Ceiling figures would keep project proposals realistic. At the same time, they should be flexible enough to rise and meet the level of assessed needs.

21. *"The government's objective for EOF (Compensatory) has not been accomplished . . . " (78.6% disagree)*

The objective is definitely in the process of being achieved and funds should continue so that school boards will come closer to the ideal of providing an 'equal educational footing' for all.

22. *"A good feature of the present method of funding compensatory education which calls for written project proposals is that school boards can be held accountable for the funds." (78.3% agree)*

However, there are other good features of project grant funding besides accountability. Project grant funding does not, in itself, ensure accountability. Monitoring local evaluations might further ensure accountability.

23. *"The preferred method of funding compensatory education is through a combination of project funding and formula funding." (73.9% agree)*

The two methods are not mutually exclusive and, therefore, may be combined to achieve desirable results. The desirability one way or the other depends largely on the nature of the formula devised.

24. *"The objective of EOF (Compensatory) is an ideal which can never be accomplished." (73.9% disagree)*

The objective is an aim towards an ideal - an ideal of equality for all - and in this sense, it is being achieved. The government should continue to fund compensatory education because the needs for it are real and gains are being made in the direction of the aim.

25. *"The Department should move compensatory education from a three year project cycle into a five year cycle." (71.4% agree)*

A longer cycle would add security to the projects and would allow for long-range planning. Also, it takes a long time to achieve aims in compensatory and results obtained after a five year project term would give a better indication of a project's success than would an evaluation after a three year term.

26. *"While funding compensatory education on the basis of Department approved proposals has certain disadvantages, it is much preferred to formula funding." (71.4% agree)*

Project grant funding is desirable because it helps to ensure that funds reach the intended targets, and it allows more flexibility. The written proposal requirements also promote better planning.

27. *"A disadvantage of the present EOF (Compensatory) policy guidelines is that some districts may work for weeks or months on a proposal without any funding, and then in the final analysis, be deemed ineligible." (70.8% agree)*

Resources expended in setting forth an elaborate proposal, which is not approved, are not recoverable. The Department should give consideration to giving tentative approval to brief proposals before allowing districts to put a lot of work into developing elaborate ones. The Department could also identify those areas which need and will receive funds and then have these school systems prepare proposals to show how the funds will be used.

28. *"The Department of Education should devise a way to disburse funds in proportion to need which does not require a board to spend money to get money." (70.8% agree)*

One way in which this may be accomplished would be for the Department to provide funds earmarked for needs assessment. Another way may be for the Department to work cooperatively with local districts in a joint approach to needs assessment.

29. *"Some districts may have pressing needs for compensatory education, but cannot participate in the Fund simply because they do not have the time or the personnel capable of writing extensive proposals of the type expected by the Department." (66.7% agree)*

To overcome this problem, the Department might make several changes in the written proposal requirement: (1) modify the guidelines making precise statements which clearly make expectations known; (2) provide a standard blank form with space to fill in the required information; (3) encourage face-to-face meetings between representatives of local districts and the Department to discuss proposed plans; (4) provide money for planning in those districts which need it; and, (5) upgrade the level of knowledge and expertise in the province relative to project development, implementation and evaluation through in-service education programs.

30. *"To expect financial support from other local organizations and individuals in a disadvantaged area is unrealistic." (65.2% agree)*

While this support may be desirable, and in some cases possible, the Department should not make access to the funds dependent upon a district's ability to obtain this support. Non-financial support from these areas would be a more realistic expectation.

31. *"Economic, cultural and social disadvantagement tends to culminate in marked educational disadvantagement. Therefore, by selecting the educationally disadvantaged, one would target almost the same pupils." (64.3% agree)*

Although there is not a complete parallel between educational disadvantagement and other types of disadvantagement, many culturally, socially or environmentally deprived children do have unique educational problems. The Department could clarify the guidelines by using educational disadvantagement as the basis for identifying the target groups for compensatory education.

32. *"The approval process could be speeded up by allowing district level personnel to present a proposal verbally in a face-to-face meeting with the policy committee or coordinator of the Fund." (62.5% agree)*

The communication provided by such a meeting would enable Department personnel to clarify written policy statements and identify potentially ineligible proposals, thus preventing district personnel from wasting valuable time and efforts.

33. *"The Department should conduct a province-wide needs assessment for compensatory education in order to determine those districts which have pressing need for it." (62.5% agree)*

The preferred way to approach such a task would be through a cooperative effort between the local district and the Department or another external group appointed specifically for that purpose. The required data for such a needs assessment may already be available and all that may need to be done is to compile existing information. A province-wide needs assessment would ensure that districts most in need of help would get it and it would eliminate competition, which is undesirable. A danger of such an assessment is that it may result in a formula which would destroy current flexibility.

34. *"Rural districts having equalized assessments per pupil of less than $4,000 do not have to document disadvantaged status. This is a positive feature of the guidelines which should be retained." (60.9% agree)*

Excluding the poorer districts, which do not have the necessary resources to conduct a thorough needs assessment, is a fair practice. As a guideline or a proxy indicator of need, equalized assessment per pupil is acceptable, but in all cases, the Department should be aware that special circumstances may warrant special consideration. Some consideration should be given to other proxy indicators of need, such as annual income data. If equalized assessment were used as the sole criterion of eligibility, it would prevent districts in those areas having high equalized assessments from presenting a special case for funding and, therefore, children in need of compensatory assistance in those areas would be denied the opportunity to receive help.

35. *"Local school boards should be expected to contribute a share to the total funding of a project." (58.3% disagree)*

The systems with the greatest need for compensatory funding are least able to contribute funding to a project. A board's contribution should depend on its ability to contribute.

36. *"Under the present policy guidelines, the EOF will fund new programs, extensions or modifications to existing programs, but will not fund existing expenditures of school boards. This is a positive feature of the Fund." (58.3% agree)*

This is acceptable since the compensatory fund is intended to supplement or extend the services provided under regular school programming; however, rigid adherence to this guideline may unduly discriminate against progressive boards which introduce compensatory programs on their own.

37. *"The government should retain the objective as a goal statement, but it should devise a way to clearly identify the target group." (58.3% agree)*

There was generally strong support for the first part of the statement, but less for the second part. Two points were brought out in the discussion of this statement: (1) the Department should look into the possibility of using available social, cultural or economic data to identify those geographic areas (jurisdictions, school attendance areas, etc.) which are in need of compensatory and which should receive funds;

and (2) student identification and selection for participation in compensatory projects should be left up to local people. Selection methods used at the local level should be as unobtrusive as possible and, perhaps, the basis for selection should be academic performance.

38. *"The feature of the guidelines which allows non-school personnel to submit proposals to school boards is of doubtful value." (57.1% agree)*

The professional is in the best position to evaluate and determine childrens' educational needs. Also, non-school personnel may find it difficult to write an acceptable proposal on their own. The Department's expectations should be made more clearly known on this point. More elaboration in the guidelines would be helpful.

39. *"The competitive nature of funding under EOF (Compensatory) was definitely a negative feature." (57.1% agree)*

Competition for funds is undesirable because districts which are able to prepare the best proposals may not be the ones in greatest need of funds. Further, areas having the largest back-up of human and financial resources are at an advantage in competitions.

40. *"The Department did not provide clear guidelines for identifying culturally, socially or environmentally disadvantaged students. Our problem is in identifying who those students are." (57.1% agreed)*

The findings were equivocal on this statement as the respondents generally agreed with the first statement and disagreed with the second. The discussion brought out the following points: (1) the initial guidelines were unclear; and (2) local district personnel have no difficulty identifying children in need of compensatory assistance.

41. *"The terms cultural, social or environmental handicap are undesirable labels which you must really play down or you can stigmatize a group." (54.2% agree)*

Stigmatizing labels such as these would not be needed if the emphasis were placed on educational deficiencies.

42. *"Under the present policy guidelines, the EOF will not fund positions which have as their major emphasis, planning, administrative, coordinative or organizational activity. This is a positive feature of the Fund and should be retained." (54.2% disagree)*

Some recognition should be given to these activities because under the present system, both the regular school programs and the compensatory projects suffer. The additional projects place a strain on the existing administration and regular programs suffer from the extra work load. The projects may not be thoroughly planned or coordinated and are endangered as well by the lack of funding of these positions.

43. *"The Department should make more funds available for the evaluation component of compensatory projects." (52.2% agree)*

Projects should be thoroughly evaluated, but this evaluation should not place a strain on the budget of the regular program, nor should it draw funds away from the instructional component of a project. Funds made available for the evaluation of projects would likely bring returns in terms of instructional improvement.

44. *"A district may have need for funds, but may not have the personnel or the time to prepare a proposal impressive enough to be approved; therefore, it does not necessarily follow that 'if you cannot write a proposal to show a need for a service, you do not have much real need for the money'." (42.9% agree, 50.0% disagree)*

In those jurisdictions not having staff with the necessary level of expertise or the time, the Department should provide funds for proposal writing.

45. *"I do feel that if compensatory education was funded on a formula basis alone, there would be a tendency to feel somewhat lax in identifying needs, specifying objectives and formulating procedures."*

While there was no clear majority of opinions regarding this statement, the predominant response was in the affirmative. (47.8% agree)

There are other factors which affect the amount of planning done by a district; for example, the desire for self-improvement. Planning steps and accountability could be built into formula funding.

46. *"The larger urban systems in Alberta should not be allowed to tap the compensatory fund. They have the tax base and resources and could provide compensatory education if they really wanted to."*

While there was no majority opinion on this statement, the predominant response was negative with 47.8% disagreeing.

Needs for compensatory education exist in every district, including the larger urban centres.

47. *"The outright project grant with no defined maxima or minima is much preferred to the per pupil grants for compensatory education."*

While there was no majority opinion on this point, the predominant response was in the affirmative with 45.8% agreeing.

The pupil grant is more convenient. Districts know what they are getting and planning may be easier. However, project grant funding may be more appropriate for compensatory education because it allows for funding in proportion to the severity of need in an area. Per pupil funding would tend to place most of the funds in the urban areas, while rural areas may actually have the greatest need for compensatory funding.

48. *"As far as the compensatory component of the Educational Opportunities Fund is concerned, a comprehensive system-wide proposal is much preferred to individual school or classroom level proposals."*

While no clear majority emerged on this statement, the predominant response was negative with 43.5% disagreeing.

Classroom level projects reflect the unique needs and situations in a school and they promote direct involvement of those who planned them, thereby building in commitment. On the other hand, a comprehensive, system-wide proposal may have the advantages of developing better leadership and cooperation, and allowing for better control and supervision of projects.

49. *"It became clear to us before long that the compensatory target children were really supposed to be those of native ancestry."*

While there was no majority opinion expressed about this statement, the predominant response was negative with 41.7% disagreeing.

It appears that the sentiments expressed in this statement were not widely held throughout the province.

50. *"The Department should discontinue funding on the basis of written proposals and move more in the direction of formula funding, but specify the target for the funds to ensure that they go where the government wants them to . . ."*

The respondents were predominantly undecided on this point (41.7%) as such a decision would really depend on the nature of the formula.

SECTION VII

THE MERIT OF EOF (COMPENSATORY) POLICY GUIDELINES:

A SURVEY OF NON-PARTICIPATING DISTRICTS

A. A Report of Data Based on Telephone Interviews.

Telephone interviews were conducted with persons in four jurisdictions who were unsuccessful in gaining approval for project proposals. The purpose of the interviews was to assess the strengths and weaknesses of the policy guidelines as viewed by those who felt strongly that pressing needs for compensatory education existed in their districts, but were denied funds on the basis of the eligibility criteria used by the Department. Interviewees were asked to respond to the question, "Based upon your experience to date, what do you see as the major strengths and weaknesses of EOF (Compensatory) policy guidelines as outlined in the Educational Opportunities Fund, Policy Manual, 1974?"

Notes were made during each telephone conversation. At the conclusion of the interview, interviewee responses were reproduced as summary statements based on the notes and recollections of the interview. Summary statements were then collated into similar response patterns and reported with introductory statements which present the general tenor of the responses. A summary of the findings follows in this section.

RESPONSE SET #1

Reasons for being disqualified varied. One district reported that they had prepared a proposal to address needs of a group which they perceived to be culturally and socially disadvantaged, but were eventually disqualified on the basis of economic criteria, despite the fact that their request had gone all the way to the Minister of Education.

> *Although we have culturally and socially disadvantaged pupils in our area, we were excluded from the Fund because our equalized assessment was too high.*

Another district reported that it was clearly eligible on the basis of low equalized assessment per pupil but personnel were left with the impression that they did not have a high enough proportion of Indian students to qualify for funds.

> *Our equalized assessment per pupil was below $4,000.00, but we got the distinct impression that unless you had a certain proportion of Indian students you wouldn't get the funds.*

RESPONSE SET #2

All the persons interviewed reported that they had spent many hours developing proposals and that it was a very frustrating experience to find out in the end that they were ineligible.

> *We put in hours and hours of work only to discover in the end that we weren't eligible under the guidelines.*

> *It was really frustrating to go to all the work of demonstrating disadvantagement and then to find out after months of work that we didn't qualify because our equalized assessment per pupil was too high.*

> *It was really a nuisance to go through all that work and then to find out in the end that we were ineligible.*

RESPONSE SET #3

Some districts stated that their experience had been a bitter one.

> *Our experience was a bitter one - bureaucratic bungling caused a letdown in relations with the community and set back planning on the Elementary component by at least a month.*

> *The whole matter finally became such a mess of "red tape" that we threw in the sponge and said to heck with it.*

RESPONSE SET #4

Other jurisdictions reported that their experience was so annoying that they would not attempt to submit proposals again in the future.

> *We became totally frustrated with the Department.*

> *We have some bitter feelings about this matter, and I don't think we would bother to apply even if more money became available.*

RESPONSE SET #5

Some of the responses made by persons interviewed indicated that there was confusion at the Department of Education level concerning the policy guidelines.

> *The biggest problem with EOF was that the guidelines were not firm. It was really annoying the way these hidden guidelines kept appearing unexpectedly all the time.*

> *The Department couldn't tell us what they meant by social and cultural handicap.*

> *There was a lack of articulation between members of the Department and Regional Office of Education. People appeared to be operating on different sets of guidelines and we were getting mixed messages.*
>
> *The guidelines were unclear and interpreted after the fact. While being disqualified on the initial round, we were clearly eligible after the guidelines were revised, but we were encouraged not to reapply.*

RESPONSE SET #6

Some jurisdictions worked for several months on proposals for students of Treaty Indian parents, only to find out in the end that such students were ineligible under the initial guidelines.

> *The guidelines said nothing about excluding Treaty Indians and we went through all that work to find out in the end that they didn't qualify.*
>
> *In the revised guidelines, the Department made provision for students of Treaty Indian parents, provided the local school districts coordinated funding with the Department of Indian Affairs. This feature also caused difficulty in one district.*
>
> *There's a real problem with a small school jurisdiction having to grapple with a massive bureaucracy like the Department of Indian Affairs. It would probably be better if the two Departments got together at a higher level.*

RESPONSE SET #7

Most of the districts contacted offered suggestions like the following which, in their opinion, would prevent other districts from going through a similar experience.

> *The Department has the data which would enable it to determine where the greatest needs are. There should be no need to have local people prove that they are disadvantaged. The Department should compile the data and select the most needy areas.*
>
> *The Department should decide which areas of the province require assistance. It should then decide on the level of funding needed to upgrade an area, announce the size of this grant to a district and then have local people plan a proposal to demonstrate how they will use the funds.*

SUMMARY

Respondents in jurisdictions denied approval for compensatory education projects have described their experiences as frustrating, bitter and annoying. In at least one instance, the level of frustration reached has convinced those involved that future efforts to secure approval for proposals would be futile. They were all left with a clear impression that the government did not have policy matters clearly defined. Several persons made an appeal to the Department to implement strategies that would prevent other districts from having an experience similar to theirs.

B. A Report of Data Based on Mail Questionnaires Administered in Other Non-Participating Districts.

Two questionnaires were mailed to the superintendents or their designated substitutes in all other jurisdictions which were not able to participate in the compensatory fund. The purpose of the survey was to assess the strengths and weaknesses of the current policy guidelines as viewed by those who were clearly ineligible under the 1974 guidelines.

A total of seventy jurisdictions were invited to respond to the first questionnaire. Sixty-two responses were received (88.6%). Of these, only fifty-two were useable responses (72.3%). In a follow-up survey of non-respondents, the following reasons were given for not wishing to evaluate EOF policy guidelines:

> *This survey does not apply in our district as we do not have a compensatory program.* (5)
>
> *The "pie" was carved up without consultation with us - we see no reason to suppose that such consultation will have any value to us now.* (1)
>
> *Our jurisdiction is one of the lowest assessment areas in the province, with its inherent educational disadvantages. However, the government in its superior wisdom excluded our participation. Therefore, the Board has directed that I make no comments for or against the compensatory component of EOF.* (1)
>
> *I simply have more important things to do.* (1)

The second questionnaire was forwarded three weeks after the first one. The purpose of the second questionnaire was to explore the principal strengths and weaknesses of the guidelines in greater depth by having respondents provide explanatory comments in the light of initial findings from the first questionnaire. The second questionnaire provided a summary of the findings, for each item, obtained on the initial return of the first questionnaire and asked each respondent to explain why he agreed or disagreed with majority opinion. The second questionnaire was forwarded to the forty-nine persons who responded within two weeks from the date at

TABLE 6

RESPONSES TO ROUND ONE DELPHI IN NON-PARTICIPATING DISTRICTS

Questionnaire Items	SA	A	U	D	SD
1. The objective of the Educational Opportunities Fund (EOF) is to					
(a) increase the number of students acquiring mastery of basic and auxiliary skills	29.2	60.4	6.3	2.1	2.1
	89.6		6.3	4.2	
(b) increase the number of students maintaining or increasing self-confidence and self-respect	33.3	52.1	10.4	4.2	0.0
	85.4		10.4	4.2	
(c) increase the visibility of educational up-grading activities province wide	25.0	35.4	14.6	16.7	8.3
	60.4		14.6	25.0	
2. Funds under EOF are directed into two priority areas of concern: elementary education and compensatory education (1)	20.8	58.3	4.2	8.3	8.3
	79.2		4.2	16.7	
3. All public or separate school students in grades one to six are eligible under the elementary component. (1)	41.7	45.8	4.2	2.1	6.3
	87.5		4.2	8.3	
4. The compensatory component is designed to serve the culturally, socially or environmentally disadvantaged students in the province at all grade levels from one to twelve. (1)	27.1	41.7	12.5	10.4	8.3
	68.8		12.5	18.8	
5. The objective of the compensatory component is, "to provide the extra assistance at the classroom level that culturally, socially, or environmentally disadvantaged students may need to aim at being on an equal footing with other students." (3)	29.2	50.0	10.4	6.3	4.2
	79.2		10.4	10.4	
6. The compensatory component excludes pupils whose primary handicap is mental, emotional or sensory. (1)	8.3	33.3	20.8	27.1	10.4
	41.7		20.8	37.5	
7. The emphasis of the Fund is on delivering human educational resources at the classroom level which are of direct assistance to teachers and students. (3)	27.1	54.2	12.5	4.2	2.1
	81.3		12.5	6.3	
8. Funds are not provided for school personnel positions which have as their major emphasis planning, administrative, coordinative or organizational activity. (4)	4.2	43.8	10.4	35.4	6.2
	48.0		10.4	45.8	
9. Under the compensatory component, only those rural jurisdictions having an equalized assessment of less than $4,000.00 per pupil are eligible for funding on a jurisdiction-wide basis. (8)	4.2	10.4	31.3	35.4	18.8
	14.6		31.3	54.2	
10. Resident pupils only are included in calculating the equalized assessment per pupil. (8)	4.2	37.5	25.0	22.9	10.4
	41.7		25.0	33.3	
	SA	A	U	D	SD

Strongly Agree = SA Agree = A Undecided = U Disagree = D Strongly Disagree = SD

TABLE 6 (Cont.)

Questionnaire Items	SA	A	U	D	SD
11. The exception to 9. above is the four large urban jurisdictions. For those districts, funding is limited to $200,000.00 annually and is distributed on a proposal basis. (8)	4.2	29.2	29.2	20.8	16.7
	33.3		29.2	37.5	
12. Except for rural districts qualifying under 9. above, all other jurisdictions have to compete for available funds.	6.3	14.6	18.8	41.7	18.8
	20.8		18.8	60.4	
13. If ineligible on a jurisdiction-wide basis, as determined by 9. above, school attendance areas within a jurisdiction can qualify if:					
(a) the equalized assessment per pupil is less than $4,000.00 for the school attendance area. (9)	16.7	29.2	37.5	14.6	2.1
	45.9		37.5	16.7	
(b) the district provides the Department with documentary evidence that an attendance area is environmentally disadvantaged on the basis of a substantial number of socio-economic factors such as: low level of education of parents; greatly sub-standard housing; language of the home other than English or French, etc. (9,11)	6.3	35.4	25.0	25.0	8.3
	41.7		25.0	33.3	
14. Within the four large urban jurisdictions eligible school attendance areas are identified on thebasis of a number of factors - including economic and health factors as judged by several independent agencies such as the Dept. of Education, Dept. of Health & Social Development, and local boards and planning agencies. (9)	6.3	37.5	37.5	14.6	4.2
	43.8		37.5	18.8	
15. Once a geographic area (jurisdiction or school attendance area) is determined to be eligible under 9. or 13. above, district level personnel then have to provide documentary evidence of educational disadvantagement of pupils. (3)	8.3	52.1	16.7	12.5	10.4
	60.4		16.7	22.9	
16. Educationally disadvantaged pupils are defined to be those who are age-grade retarded by one year or more, or unable to benefit from current level programs, as determined by appropriate indicators. (9,10)	10.4	52.1	16.7	16.7	4.2
	62.5		16.7	20.8	
17. Funds are appropriated on an outright project grant basis. Payment is determined by nature, size and scope of the project. (3)	8.3	54.2	16.7	16.7	4.2
	62.5		16.7	20.8	
18. The maximum allowable grant is calculated by multiplying the total number of disadvantaged pupils (as defined by 16. above) times $200.00 annually. (10)	4.2	35.4	35.4	20.8	4.2
	39.6		35.4	25.0	
19. Having established economic eligibility of a jurisdiction or school attendance area and the number of educationally disadvantaged pupils within either of those geographic areas, it is then up to the local district to develop a comprehensive project proposal and submit it to the Department for approval. (10)	8.3	66.7	8.3	12.5	4.2
	75.0		8.3	16.7	
20. The project proposal has to demonstrate that a needs assessment has been carried out, that a specific problem area has been addressed, that objectives have been established and that a method of evaluation has been devised. (18-22)	16.7	64.6	8.3	8.3	2.1
	81.3		8.3	10.4	
21. The Department of Education recommended that projects be developed which would (a) offer new or different strategies for teaching the basic skill subjects of reading, mathematics and language arts.	25.0	50.0	16.7	6.3	2.1
	75.0		16.7	8.3	
(b) improve the disadvantaged child's self-concept.	33.3	47.9	18.8	0.0	0.0
	81.3		18.8	0.0	
(c) facilitate psychomotor development by encouraging success in physical education endeavors. (12)	14.6	56.3	25.0	4.2	0.0
	70.8		25.0	4.2	
	SA	A	U	D	SD

Strongly Agree = SA Agree = A Undecided = U Disagree = D Strongly Disagree = SD

which the initial questionnaire was mailed. Of the forty-nine questionnaires forwarded in the second mailing, thirty-three (67.4%) were returned by the cut-off date of June 18, 1976. In the analysis which follows, statistical data from the first questionnaire are presented, along with explanatory comments from both the first and second questionnaires. In discussing the data, responses in the two categories, 'strongly agree' and 'agree,' were collapsed into a single 'agree' category. A similar procedure was used with the response options on the disagree side of the scale.

Item #1: The objective of the Educational Opportunities Fund (EOF) is to:

(a) increase the number of students acquiring mastery of basic and auxiliary skills,

(b) increase the number of students maintaining or increasing self-confidence and self-respect, and

(c) increase the visibility of educational upgrading activities province-wide.

Of the respondents, 89.6% agreed that 1(a) represents a positive feature of the EOF program; 85.4% agreed that 1(b) represents a positive feature of the program; and 60.4% agreed that 1(c) represents a positive feature of the program. It seems that, while the respondents are in agreement with the three stated objectives, as a group they are not quite as committed to the public relations objective of the program as they are to the educational objectives.

A typical response from those supporting the basic skills emphasis was, "Basic and auxiliary skills should be the prime objective to ensure a basis for continuous independent learning throughout life." Those agreeing with item 1(b) felt that improved performance in the basic skills areas contributed to improved self-confidence and self-respect. Others made the reverse statement indicating that little could be accomplished in the basic skills areas without adequate feelings of self-worth.

With regard to item 1(c), those who favoured the increased visibility objective tended to cite"academic accountability" as their reason. A typical comment: "the day of academic accountability has arrived. We need visible evidence to parents that we do care." A typical comment from those who disagreed: ". . . I do not feel that PR is a valid reason for any educational program. If educational upgrading is occurring, it will be visible without making visibility a specific objective."

Item #2: Funds under EOF are directed into two priority areas of concern: elementary education and compensatory education.

Item #3: All public or separate school students in grades one to six are eligible under the elementary component.

Item #4: The compensatory component is designed to serve the culturally, socially or environmentally disadvantaged students in the province at all grade levels from one to twelve.

Item #5: The objective of the compensatory component is, "to provide the extra assistance at the classroom level that culturally, socially, or environmentally disadvantaged students may need to aim at being on an equal footing with other students."

Item #6: The compensatory component excludes pupils whose primary handicap is mental, emotional or sensory.

Of those who responded, 79.2% agreed that item 2 is a positive component; 87.5% agreed that item 3 is positive; 68.8% agreed that 4 is positive; and 79.2% agreed that item 5 is positive. However, only 41.7% of the respondents agreed that item 6 is a positive element of the EOF guidelines. It appears that as a group the respondents are in agreement with the need for compensatory programs in the schools of the province. While they agree that culturally, socially and environmentallly disadvantaged children require extra attention, they appear to be unhappy that children with mental, emotional or sensory handicaps are not included in the program.

The written comments indicate, however, that while the respondents are in favour of the expressed intentions of the programs, they are not convinced that all who should receive compensatory help are getting it. Particular concern was expressed about native students and "small pockets" of disadvantaged students in areas of the province outside currently eligible areas which are being passed over under the present regulations. Typical responses were:

> *There are pockets of 'disadvantaged' which fail to obtain benefit*
>
> and
>
> *The Department had no intentions of giving compensatory EOF to some areas.*

Concern was also expressed about keeping compensatory education as a component of EOF. Some felt that there may be a need for different methods of funding for each of the two components. While there is general support for the grade one to six emphasis in the elementary component, there are those who feel that the scope should be expanded at least to include the junior high grades. Those who agreed with the policy of excluding mental, emotional or sensory handicaps from the Fund, did so on the basis that other funding is available in these problem areas. Many of those who agreed, qualified their response by stating that, "provided funding continues for the mentally, physically and emotionally handicapped." Those who wanted inclusion of mental, emotional or sensory handicaps argued that current funding in these problem areas is inadequate and that such problems are often related to cultural, environmental and social factors anyway.

Item #7: The emphasis of the Fund is on delivering human educational resources at the classroom level which are of direct assistance to teachers and students.

Item #8: Funds are not provided for school personnel positions which have as their major emphasis planning, administrative, coordinative or organizational activity.

Of those who responded, 81.3% agreed with item 7, but only 48.0% agreed with item 8. It appears that, while the respondents agree with the emphasis being on delivery of human educational services at the classroom level, there is a good deal of discontent due to the fact that administrative support is largely ignored in the funding arrangements. The written comments indicated concern that many smaller jurisdictions cannot afford to hire the extra administrators and curriculum consultants required to make programs successful, and that as a result, some jurisdictions which need compensatory programs may not even apply for funds because they cannot afford the administrative back-up costs. One superintendent estimated that the cost to his board for his time was $10,000 to prepare an application for a $2,000 EOF grant.

Item #9: Under the compensatory component, only those rural jurisdictions having an equalized assessment of less than $4,000.00 per pupil are eligible for funding on a jurisdiction-wide basis.

Item #10: Resident pupils only are included in calculating the equalized assessment per pupil.

Item #11: The exception to 9. above is the four large urban jurisdictions. For those districts, funding is limited to $200,000.00 annually and is distributed on a proposal basis.

Item #12: Except for rural districts qualifying under 9. above, all other jurisdictions have to compete for available funds.

Item #13: If ineligible on a jurisdiction-wide basis, as determined by 9. above, school attendance areas within a jurisdiction can qualify if:

(a) the equalized assessment per pupil is less than $4,000.00 for the school attendance area.

(b) the district provides the Department with documentary evidence that an attendance area is environmentally disadvantaged on the basis of a substantial number of socio-economic factors such as: low level of education of parents; greatly substandard housing; language of the home other than English or French, etc.

Item #14: Within the four large urban jurisdictions eligible school attendance areas are identified on the basis of a number of factors including economic and health factors as judged by several independent agencies such as the Department of Education, Department of Health and Social Development, and local boards and planning agencies.

Of those who responded, only 14.6% felt that item 9 is a positive feature of the program; 41.7% felt that item 10 is a positive feature; 33.3% felt that item 11 is a positive feature; 20.8% felt that item 12 is a positive feature; 45.9% felt that item 13(a) is a positive feature; 41.7% felt that item 13(b) is a positive feature; and 43.8% felt that item 14 is a positive feature of the program. It appears that, while the respondents as a group are generally pleased with the intent and objectives of the EOF (Compensatory) program, there is a good deal of dissatisfaction with the specific regulations used to distribute the funds.

The written comments indicated great displeasure with the concept of using assessment rates, rather than student performance, as the the qualifying factor. A great deal of suspicion was expressed that the $4,000.00 per pupil assessment figure had been specifically chosen by provincial officials to include only those areas of the province which had been previously determined to be entitled to funding ("The Special Grants Club"), and to exclude all others. There was concern that, in many jurisdictions where projects were required for "small pockets," the jurisdiction-wide criterion would rule out such programs. Further, school boards would not go ahead with such programs without additional outside funding. Those who opposed the use of the economic eligibility criterion based on equalized assessment, as stated in item 9, offered comments like the following:

> *The School Jurisdiction's operational costs and budget (income and expenditures) should be the basis for establishing economic need for compensatory grants - on a yearly basis.*
>
> *Disadvantaged can occur in isolated pockets of jurisdictions having larger assessments. Using the $4,000 is just a new way of issuing special grant support to certain areas of the province.*
>
> *Pockets of compensatory need exist everywhere.*
>
> *Jurisdictions which are ineligible supposedly have the funds to provide special programming but have not seen this program as a top priority item - are they then meeting the needs of their students?*
>
> *All rural jurisdictions have disadvantaged students and need funds earmarked for such, which cannot be placed in the general coffers.*
>
> *Provision for minorities with difficulties should be based on needs due to disability, not assessment. Boards may refuse to raise mill rate to provide programs for minorities having difficulties.*
>
> *Services should be provided wherever need is not being met. It logically follows that jurisdictions already meeting the need can justify some funding rather than being penalized for doing a good job.*

The non-resident clause was attacked on the basis that it is unnecessarily discriminatory against those school jurisdictions which have a high proportion of non-resident pupils. Typical comments include:

> *We have many from the reserve that use part of the total resources available within the county.*
>
> *Some jurisdictions spend considerable sums on non-resident students. These should be included.*
>
> *In our districts, resident pupils constitute only 70% of our pupil content. Whereas, in fact, non-resident pupils cannot be counted in calculating equalized assessment per pupil, they should be counted.*
>
> *Due to numbers, rural areas often request urban centers to accept problem students rather than attempt to provide specialized services. This is not always recognized adequately.*

Some bitterness was expressed that large cities were treated as a different case.

> *The needs of the large urban jurisdictions are no more important than those of the rural jurisdictions.*
>
> *Why shouldn't rural jurisdictions then have the same option as we have "pockets" similar to cities.*

The competitive factor mentioned in item 12 was a sore point. It was felt that larger jurisdictions with more resources would be able to prepare better proposals and thus obtain an inordinate share of the available funds, while smaller jurisdictions, with fewer resources available for the preparation of proposals, would tend to lose out.

> *Competition places too much strain on local resources in preparing proposals. Those who already have, get more because they can prepare better proposals.*
>
> *Surely the Department is in a position to see who needs assistance. Approach each area that may be perceived as having a need.*

A great deal of concern was expressed by some of the respondents about the difficulty related to providing documentary evidence of disadvantaged status as in item 13(b). The procedure places a heavy demand on local resources and discriminates against those jurisdictions not having the manpower to be able to present such evidence to the Department. Some of the respondents felt that the Department should determine, on the basis of available data, which districts are in greatest need of compensatory aid. Others felt that it was a district's responsibility to conduct its own needs assessment and the Department's responsibility to respond to these needs.

Some of the responses supported item 13(b). The main support for this aspect of the guidelines stems from the fact that "pockets" of disadvantaged children are found in some jurisdictions. Universal application of the equalized assessment criteria of item 9 excludes these pockets; therefore, it is desirable to have another procedure for targeting widespread pockets throughout the province.

Item #15: Once a geographic area (jurisdiction or school attendance area) is determined to be eligible under 9. or 13. above, district level personnel then have to provide documentary evidence of educational disadvantagement of pupils.

Item #16: Educationally disadvantaged pupils are defined to be those who are age-grade retarded by one year or more, or unable to benefit from current level programs, as determined by appropriate indicators.

Item #17: Funds are appropriated on an outright project grant basis. Payment is determined by nature, size and scope of the project.

Item #18: The maximum allowable grant is calculated by multiplying the total number of disadvantaged pupils (as defined by 16. above) times $200.00 annually.

Of those who responded, 60.4% agreed with item 15; 62.5% agreed with item 16; 62.5% agreed with item 17; and only 39.6% agreed with item 18. There appears to be moderate agreement about the desirability of providing documentary evidence of educational disadvantagement, with the manner in which educational disadvantagement is defined, and with funding being determined by the nature, size and scope of an individual project. However, there seems to be dissatisfaction with the amount of the maximum allowable grant. While some stated that they had no basis for deciding what an adequate figure would be, others made comments like the following:

> *I disagree with this feature because it may not provide the required funds for the corrective program required - particularly in the less populated jurisdiction.*
>
> *It helps, but in some cases, just not enough.*

Item #19: Having established economic eligibility of a jurisdiction or school attendance area and the number of educationally disadvantaged pupils within either of those geographic areas, it is then up to the local district to develop a comprehensive project proposal and submit it to the Department for approval.

Item #20: The project proposal has to demonstrate that a needs assessment has been carried out, that a specific problem area has been addressed, that objectives have been established and that a method of evaluation has been devised.

Item #21: The Department of Education recommended that projects be developed which would -

(a) offer new or different strategies for teaching the basic skill subjects of reading, mathematics and language arts,

(b) improve the disadvantaged child's self-concept,

(c) facilitate psychomotor development by encouraging success in physical education endeavours.

Of those who responded, 75.0% agreed with item 19; 81.3% agreed with item 20; 75.0% agreed with item 21(a); 81.3% agreed with item 21(b); and 70.8% agreed with item 21(c). It appears that, as a group, the respondents agree with the need to submit a comprehensive proposal based on assessed needs, specific problems and established objectives. The emphasis on innovative strategies and the focus on improved self-concept and psychomotor development appear to be well received. While the written comments for this section were quite sparse, some concern was expressed that the requirements and steps for assessing needs, specifying problems and outlining objectives should be set out in such a way that smaller jurisdictions could prepare a submission easily and without a lot of costly, outside help.

SUMMARY

The following summary is based upon the results of two questionnaires administered to superintendents or their designates in non-participating districts. Figures are presented in parentheses which represent the questionnaire item and percentage response to each item on which the summary statement is based.

In summary, it may be said that on the basis of the information provided by the questionnaires, superintendents whose jurisdictions have not qualified for EOF (Compensatory) funds are:

1. generally in sympathy with the objectives of the EOF program (1:89.6%, 2:85.4% agree).
2. generally in sympathy with the objective of the compensatory component of EOF (5:79.2% agree),
3. generally in sympathy with the emphasis of the Fund on delivering human educational resources at the classroom level which are of direct assistance to teachers and students (7:81.3%),
4. generally in sympathy with EOF funds being allocated for elementary education and compensatory education (2:79.2% agree),

5. generally in sympathy with the emphasis on providing funds for public and separate school students in grades one to six (3:87.5% agree),

6. generally in sympathy with preparing a project proposal after having established eligibility on the basis of economic and educational factors (19:75.0% agree),

7. generally in sympathy with the project proposal requirement which calls for assessing needs, defining problems, specifying objectives and establishing evaluation procedures (20:81.3% agree), and

8. generally in sympathy with the Department's program requirements which place emphasis on offering new or different strategies for teaching the basic skill subjects, attempts to improve the disadvantaged child's self-concept and facilitates psychomotor development through physical education endeavours (21:75.0%; 81.3%; 70.8% agree)

While the support for some features of the program was not strong, it may be said that the superintendents whose jurisdictions have not qualified for funds:

1. moderately support the public relations objective of EOF (60.4% agree),

2. moderately support the definition of the target population: the culturally, socially or environmentally disadvantaged students in the province at all grade levels from one to twelve (4:68.8% agree),

3. moderately support the feature of the guidelines which requires local districts to provide documentary evidence of educational disadvantagement after having established eligibility on a jurisdiction-wide or school attendance area basis (60.4% agree),

4. moderately support the Department's definition of educational disadvantagement (62.5% agree), and

5. moderately support the appropriation of funds on an outright project grant basis where payment is determined by the nature, size and scope of the project (62.5% agree).

While it may be said that, for the most part, the superintendents whose jurisdictions have not qualified for funds generally support the EOF (Compensatory) program, there are specific features which cause concern. In general, it may be stated that the superintendents are:

1. concerned that pupils whose primary handicap is mental, emotional or sensory are excluded from the compensatory fund (6:41.7% agree),

2. concerned that funds are not provided for positions which have as their major emphasis planning, administrative, coordinative or organizational activity (8:48.0% agree),

3. dissatisfied with the initial economic criterion of eligibility: only those rural jurisdictions having an equalized assessment of less than $4,000 per pupil are eligible for funding on a jurisdiction-wide basis (9:14.6% agree),

4. concerned that only resident pupils may be included in calculating equalized assessment per pupil (10:41.7% agree),

5. concerned that large urban jurisdictions receive compensatory aid (11:33% agree),

6. dissatisfied that rural jurisdictions with equalized assessment per pupil figures in excess of $4,000 have to compete for funds (12:20.8% agree),

7. concerned with the feature of the guidelines which requires local districts to provide the Department with documentary evidence of environmental disadvantagement (13:41.7% agree) and,

8. concerned that the maximum allowable grant per educationally disadvantaged is $200 (18:39.6% agree).

Superintendents are concerned that current regulations are unwittingly preventing some children who need help from obtaining the benefits of compensatory programs, especially native children, "small pockets" of disadvantaged children and those with mental, emotional and sensory handicaps. They are dissatisfied with many aspects of the specific funding arrangements being used to implement the program, and with the 'red tape' and administrative expense now required to document need and prepare a proposal. They would like to have a simplified documentation and application procedure which would not discriminate against smaller jurisdictions with fewer human and financial resources.

C. A Summary of Comments Made by Personnel in Non-Participating Districts.

Respondents were invited to offer additional comments and suggestions for improvement of EOF (Compensatory) education in Alberta. Typical responses are presented here to provide the reader with the general feeling of people in non-participating districts. The predominant feeling about EOF (Compensatory) is that there is too much 'red tape' involved. For the reader's convenience responses were divided into three categories: negative comments, suggestions for improvement and those who felt, because they had no experience with EOF (Compensatory), they could not comment.

Three-quarters of the comments made by non-participating districts were negative. The negative comments were divided further into four categories: general, definition of disadvantaged, earmarked funding and red tape.

General negative comments dealt with the $4,000 assessment per pupil, proper use of EOF (Compensatory) funding, and not getting funds. Representative comments are given below:

> *1. It is felt that many jurisdictions are using EOF (Compensatory) to pay for part of basic education. One way or another, they are circumventing the spirit of EOF (Compensatory) when the content of their programs is more of a 'right' than an opportunity. More stringent enforcement of guidelines is needed.*
>
> *2. Cities should not receive a lump sum when they have as many (or more) resources as many other areas whose assessment exceeds $4,000 per pupil.*
>
> *3. The $4,000 assessment per pupil criterion excludes potential projects that may be vital. The basis for approval should be need, as measured by educational, cultural and social deficiencies as well as economics. Economics should not be a disabling factor.*
>
> *4. While we developed an indepth program, we initially were not funded because of the number of students considered disadvantaged relative to our school population. We had a classroom of children in a school of 600 which is likely as large a percentage as any large school divisions have. However, no funds.*

Some personnel felt the definition of disadvantaged was nebulous and pointed out that other students than native students were disadvantaged. The comments below will illustrate this feeling.

> *1. Some of the terms are "fuzzy," e.g. "disadvantaged." Many children in so-called "rich" districts need special help and extra support funds. Geography plays too big a part within funding allocations.*
>
> *2. The guidelines appear to me to be aimed at getting funds to minority, ethnic and economic groups. Factors such as sparsity and isolation have a very visible "disadvantaging" effect on all children, irrespective of whether they are part of a minority group. Funds should be more generally available to systems who demonstrate a need.*
>
> *3. Our system has three or four hundred pupils that might qualify as disadvantaged, but since they are native students, they do not qualify. When all pupils qualify, it would be worth our time to answer the other questions.*
>
> *4. The major thrust of funding under the compensatory component appears to indicate that it is only the native population which requires assistance. It would be unrealistic to disagree with the belief that native children require additional*

> *assistance, however, it is also unrealistic to assume that other children cannot benefit from similar assistance.*

Earmarked money for funding is strongly opposed by non-participating districts in favour of a general revenue fund. The responses below portray this opposition.

> *1. I am strongly opposed and am becoming more so to "earmarked" grants. Put the funds in general revenue and let those closest to the level of implementation decide on use.*
>
> *2. Provide no such "earmarked" grant loaded with red tape and regulatory procedures. Simply provide funding for additional teachers for general elementary programs and funding for nutrition lunch programs/ health care programs up to junior high school.*
>
> *3. This jurisdiction is well known for its opposition to "earmarked" or "incentive" grants and have made numerous representations to this effect.*
>
> *4. We are against all earmarked funding.*

The majority of negative comments had to do with the problem of 'red tape.' A particularly strong, but representative, response is recorded below.

> *If education were funded sufficiently, it would not be necessary to employ brief-writers, needs assessors and additional secretarial help, etc. at the district level. It is also interesting to calculate what the government could save by providing the needed funds without the bureaucracy needed to operate these fund-raising "games." The very areas which need these funds do not have the money to employ the personnel to obtain them. (The provincial government should not use rightful educational funds for political gains. That is what EOF is - a way to use taxpayers' money to buy their own votes).*

Other comments embody similar feelings.

> *1. Considering the number of restrictions and regulations, most jurisdictions would be reluctant to even attempt applications for compensatory funding.*
>
> *2. Reporting procedures are complicated and difficult, whereas I cannot question the benefit of the fund and whereas I feel the program has, for the most part, achieved - to a considerable extent - its primary objectives. I shudder at the administrative time involved in setting up, obtaining approval and maintaining these programs. There has to be an easier way!*
>
> *3. The present arrangement expends a great deal of human resources, time and finance on paperwork, red tape or similar terms. However, at the same time accountability must be emphasized.*

> *4. Neither of the EOF funds (Compensatory or Elementary) have been satisfactory. There have been far too many 'regulations' changing with regularity from the inception of the Fund. Furthermore, development of projects and requests for funding have created an unnecessary burden for local systems. There has to be an easier, more effective way of directing funds for upgrading educational programs.*
>
> *5. For small jurisdictions, the process for applying for funds is too complicated to warrant research to ascertain what funds could be applied for. If a jurisdiction simply determined its 'disadvantaged' population and supplied a moderate proposal of educational modification in keeping with the grant, all areas would be able to do something for the children in question. I believe most areas would make good use of funds - particularly if distributed at the classroom teacher level.*

The following responses are suggestions for improvement. Mostly, the comments are straight-forward and speak for themselves; therefore, they are presented verbatim.

> *1. Guidelines for developing a proposal should include special programs which the jurisdiction is already providing in order that proliferation and overlapping of additional programs does not take place.*
>
> *2. Compensatory funds should be based on the school's jurisdiction operational budget on a year-to-year basis and not on pupil assessment. This would enable the funds to be allocated where the need is most crucial and would also eliminate proliferation of proposals which have been rejected in the past.*
>
> *3. Serious consideration should also be placed on the number of program and curriculum consultants and supervisors (support staff) a jurisdiction has employed for improving, revising and establishing more appropriate programs with the finances and resources that are available at the local level, before consideration is given for funding additional programs. For example, some (the more wealthy) jurisdictions appear to have a reasonably good supply of such resources while others are well below an acceptable level.*
>
> *4. The four large urban Districts should not be eligible. Place more emphasis on fine arts - practical skills - and less on Americanized bullshit kits for drill in basic skills.*
>
> *5. (a) EOF funds should be available to all students, regardless of grade, if need is shown.*
> *(b) If the Compensatory component is retained,*

> *provision should be made for funding projects in remote areas, regardless of pupil/assessment ratio, on the basis of need.*
>
> *(c) Administrative funding is needed. These projects take time to plan and to monitor adequately.*

> *6. All jurisdictions do have the learning disadvantaged children. If funds were made available through the normal funding procedures, then the calibre of programs for disadvantaged would improve in all areas. This is because, when funds are extremely limited, the jurisdictions simply increase pupil-teacher ratios and cut down on materials that would enhance and enrich a good resource area program. I am sure many problems would be resolved if every K-6 school had the funds to organize one good learning resource room and staff this room with a resource teacher. This would benefit all students, but especially the disadvantaged.*

Comments by personnel in non-participating districts who felt they had no basis to respond from are the following:

> *1. As we are not eligible for EOF Compensatory funds, I have commented only on those items which, in my opinion, are directed to EOF Elementary. Those who are involved in the Compensatory programs will be able to give a more learned assessment of its advantages and disadvantages than I.*

> *2. Difficult to respond since we have had no experience with the Compensatory education component.*

In conclusion, this final response is given.

> *I feel very strongly that the main criteria for funding EOF (Compensatory) needs (projects) should be based on the financial ability of a school system to up-grade the programs for students identified as disadvantaged. If a need is identified, but a school system cannot provide special programming to adequately meet the needs for the students, due to financial (demonstrated) restraints, then the government should provide extra funds (EOF (Compensatory)) for this purpose. Cultural disadvantagement should not be the main criteria for such funding as it appears to be at the present time. At least this is what we were lead to believe when we attempted to gain access to these funds. For example, if we did not have a substantial native school population, we stood no chance of getting projects approved. I strongly feel that there are many factors which must be considered when determining what type of pupil should be eligible for extra funding. Cultural disadvantagement may result from numerous facotrs; what is crucial*

is not a pupil's cultural background but his performance in school as compared to the performance of his peers in regards to age-grade placement and achievement.

SECTION VIII

PROGRAM RESULTS: A SURVEY OF ALL JURISDICTIONS OPERATING PROJECTS

A. A Report of Data Based on Interviews.

Interviews were held in all jurisdictions operating compensatory education projects during the 1975-76 school term. A total of forty-six persons were interviewed including twelve superintendents (S), sixteen deputy and assistant superintendents (A), nine project supervisors (P), and nine school board members (B). The purpose of the interviews was to gather the opinions of the respondents about the outcomes of EOF (Compensatory). Subjects interviewed were asked to respond to the question, "Based upon your experience to date, what desirable and/or undesirable outcomes have resulted from your projects funded in part, or in total by EOF (Compensatory)?"

The interview data is presented in the manner employed in section V. As before, response sets have been rank ordered, from highest to lowest, according to the degree of support for each summary statement. The majority classification was used to indicate a high frequency of occurrence of a particular response type, while minority represent a low frequency response. The major findings resulting from the interviews follow.

RESPONSE SET #1

A *majority* of the respondents reported improvements in student attitudes towards school.

> *Although we have no specific results which measure attitudes and motivation, I would say that there's been an improvement. (S)*
>
> *If there is any one strong point in the program, it's that we're changing student attitudes. (P)*
>
> *An improvement in student attitudes seems to be quite widespread. (A)*

RESPONSE SET #2

A *majority* of the respondents reported that improvement has been noticed in the students' level of self-confidence.

There has been noticeable improvement in students' self-confidence and self-respect. (P)

The level of self-confidence and self-respect has really increased for many of the students in compensatory projects. (S)

We have some pretty strong evidence already of some significant changes in students' self-confidence, self-respect, motivation and attitudes. (S)

RESPONSE SET #3

A *majority* of the respondents indicated that EOF (Compensatory) has been favourably received in their districts.

We are wildly enthusiastic about EOF. (P)

Both components of the Educational Opportunities Fund were well received in our district. (A)

The program has been really successful in our area. The only problem is that the funding isn't high enough and it should be increased. (P)

In spite of the little problems and hangups in getting the project underway, generally the people in our district are very pleased with compensatory. (P)

Despite all the hassles and frustrations we're happy with the compensatory program. (S)

There's no question, the compensatory program is invaluable to our district. (A)

The response to EOF in our community has been fantastic. (S)

While we know that more dollars may not be the answer, it is an answer and compensatory funding can provide us with some means to do things which we couldn't do before. (S)

RESPONSE SET #4

A *majority* of the respondents reported improvements in instructional skills and knowledge.

The instructional skills of teachers have definitely improved and this is due largely to the in-service education programs. (S)

It's a very worthwhile program. The teachers have a new way to teach reading which is very successful. (B)

> *Compensatory funds have made professional development conferences possible and these have definitely improved instructional skills and knowledge. (A)*

RESPONSE SET #5

A *majority* of the respondents reported gain in the level of academic performance.

> *The projects have improved mastery in the basic skill areas. (P)*
>
> *The non-compensatory education teachers also report noticeable gains in students involved in compensatory programs. (P)*
>
> *The opinions of teachers and parents reveal that there has been a definite improvement in almost all of the students who are included in the compensatory program. (P)*
>
> *We have a very positive thing to report. Our evaluation results last year showed that reading scores doubled in grade one. (S)*

RESPONSE SET #6

A *majority* of the respondents reported improvement in program development skills.

> *Skills relative to needs assessment, program planning and evaluation have definitely improved. (A)*
>
> *The staff has developed considerably greater skill in project planning as a result of EOF. (S)*

RESPONSE SET #7

A *majority* of the respondents reported improvements in staff morale.

> *The staff feels that it is doing something for these kids now. There isn't the relinquishment, the tendency to throw up ones hands and quit. The responses have been favourable because they've got something they can use now. (A)*
>
> *Because of the working and living conditions in disadvantaged areas, I think it's fair to say that the morale is usually somewhat lower than in other areas of the province. One thing compensatory education projects have done is stimulated improved morale because the instructional budget has been increased. (S)*

> *The staff has faced problems in the schools much better than they did before. (A)*

RESPONSE SET #8

A *majority* of the respondents reported that the compensatory education program has created an awareness of the intensity of the need for the program.

> *One thing compensatory has done is that it has made us aware of the problems and that something has to be done about them. (A)*
>
> *A side effect of the project in our district is that it has made us more aware of the needs for compensatory-type programs. (S)*
>
> *The compensatory program made it possible to address very important and major student needs that were being overlooked prior to the Fund. (A)*
>
> *Disadvantaged pupils are certainly in need of compensatory programs in our district. (S)*
>
> *There's a real need in our district to do something for the culturally and socially disadvantaged. (B)*

RESPONSE SET #9

A *majority* of the respondents reported that the project grants received through EOF (Compensatory) have helped maintain support for the instructional component as pressure on the educational dollar increases.

> *Increasing operating costs in recent years have placed a great drain on the instructional program. Compensatory funds have been a real shot in the arm in terms of boosting support for the educational materials and services. (S)*
>
> *Budgets are very tight. Frequently, the only things that a board can cut are instructional materials; compensatory funding helps supplement the instructional budget. (S)*

RESPONSE SET #10

A *minority* of the respondents reported that with the amount of "red tape" involved in trying to get funds, in the final analysis, the benefits did not justify the costs.

> *There is just too much red tape involved in EOF. They should put the funds into general revenue and let the people closest to the needs decide where to spend the money. (S)*

> *With the hassle we went through trying to get the proposal approved, there is no way we would attempt to get funds again. (A)*

> *EOF takes too much administrative time. Our administrators have their regular jobs to do and they are being neglected, handling all the paper work that goes with EOF (Elementary) and (Compensatory).*

SUMMARY

Based on interviews held in all participating districts, opinions expressed by interviewees revealed the following outcomes of EOF (Compensatory).

MAJORITY OPINION

1. Student attitudes toward school have improved.
2. Students' level of self-confidence has increased.
3. The general response to compensatory education has been favourable.
4. Project staffs' instructional skills and knowledge have improved.
5. Student level of academic performance has improved.
6. Project staffs' program development skills have improved.
7. Staff morale in participating districts has improved.
8. Local projects have increased awareness of the intensity of the need for efforts of a compensatory nature.
9. EOF (Compensatory) funds have helped to sustain the level of funding for classroom instruction as overall operating costs increased.

MINORITY OPINION

1. With the heavy drain placed on administrative time, the difficulty associated with the project approval process, the nuisance of Departmental "red tape" and other factors, in the final analysis, EOF (Compensatory) has not produced outcomes of sufficient worth to justify costs.

B. A Report of Data Based on Mail Questionnaires and Telephone Interviews.

After completing a preliminary analysis of the interview data reported above, some of the ideas expressed by persons interviewed were selected and used to develop a follow-up mail questionnaire. The purpose of the survey was to invite reactions from a larger respondent group to some of the points of view expressed during the initial round of interviews. In all, eighty-one persons were invited to participate in the survey. The group surveyed included all superintendents, deputy and assistant superintendents, project supervisors and school board chairmen in all districts operating projects during the 1975-76 school year. Each respondent was given the option to reply by mail alone or to combine a mail response with a telephone interview.

The findings are presented here in the manner employed in section VI. First, the quotation selected from the interview transcripts is presented in italics. Next, a statement summarizes the reactions to the quotation in terms of the percentage response obtained on an agree-disagree scale. As in section VI, responses are reported by collapsing the ends of the scale into a single agree or disagree response. The term *majority* was used to indicate more than fifty per cent response on either side of the scale. The percentage responses found for each item are presented in Table 7. Finally, a discussion follows each summary statement presenting the findings. This discussion summarizes the comments made by respondents during telephone interviews as well as those presented in writing on the questionnaires.

STATEMENT #1

> *"Compensatory education has enabled us to use new and unique ways of teaching the skill subjects of reading and mathematics."*

FINDINGS:

The majority of the respondents agreed with the statement. (100.0%)

DISCUSSION:

Some of the respondents reported that home and community involvement projects, small group instruction, and individualization have been used. It was generally felt that the use of new and unique methods was a very desirable outcome of compensatory funding.

> *Individualization is an established fact in all of our compensatory programs. (A)*
>
> *Through the use of small groups we have been able to use many different methods for teaching reading. (P)*
>
> *The new procedures teachers are using really seem to be working. (B)*

TABLE 7

PROGRAM RESULTS: RESPONSES TO ROUND TWO DELPHI

Statement	SA	A	U	D	SD
Compensatory education has enabled us to use new and unique ways of teaching the skill subjects of reading and mathematics.	42.9	57.1	0.0	0.0	0.0
	100.0		0.0	0.0	
There is fairly strong evidence in our district to suggest that EOF (Compensatory) has improved student attitudes and motivation.	57.1	42.9	0.0	0.0	0.0
	100.0		0.0	0.0	
There is fairly strong evidence available in our district to suggest that EOF (Compensatory) has increased the level of self-confidence and self-respect of "disadvantaged" students.	39.1	47.8	13.0	0.0	0.0
	87.0		13.0	0.0	
Community reaction to EOF (Compensatory) is favourable.	21.4	64.3	14.3	0.0	0.0
	85.7		14.3	0.0	
There has been an improvement in instructional skills and knowledge since EOF (Compensatory) was introduced in our district.	16.7	66.7	16.7	0.0	0.0
	83.3		16.7	0.0	
There is fairly strong evidence available in our district to suggest that EOF (Compensatory) has increased the students' level of mastery of reading, mathematics and language.	34.8	47.8	13.0	4.3	0.0
	82.6		13.0	4.3	
Our evaluation results contain a good balance of opinion data and test scores.	7.1	71.4	21.4	0.0	0.0
	78.6		21.4	0.0	
Since the inception of EOF (Compensatory) there has been an increase in professional growth of teachers.	8.3	62.5	25.0	4.2	0.0
	70.8		25.0	4.2	
There has been an improvement in staff morale since the inception of compensatory education in 1973.	17.4	47.8	34.8	0.0	0.0
	65.2		34.8	0.0	
There has been a noticeable increase in the interest which parents have taken in their children's education since EOF (Compensatory) was introduced in our district.	12.5	16.7	58.3	8.3	4.2
	29.2		58.3	12.5	
	SA	A	U	D	SD

Strongly Agree = SA　Agree = A　Undecided = U　Disagree = D　Strongly Disagree = SD

STATEMENT #2

> *"There is fairly strong evidence available in our district to suggest that EOF (Compensatory) has improved student attitudes and motivation."*

FINDINGS:

The *majority* of the respondents agreed with the statement. (100.0%)

DISCUSSION:

Some respondents reported that they had objective documentary evidence of improvements in motivation and attitudes, while others based their judgments on reports from parents and teachers. However, all respondents felt that the program was quite successful in this regard.

> *Our evaluation indicated that 80% of the teachers and 88% of the parents responding felt that student attitudes and motivation had improved. (P)*

> *We are finding that students are relating very well to the program. (A)*

STATEMENT #3

> *"There is fairly strong evidence in our district to suggest that EOF (Compensatory) has increased the level of self-confidence and self-respect of 'disadvantaged' students."*

FINDINGS:

The *majority* of the respondents agreed with the statement. (87.0%)

DISCUSSION:

Many of those who agreed with the statement stated that their evidence came from reports of teachers, parents, aides and/or others significant in the lives of the students. While some respondents were reserved in their agreement and noted that much of this information was subjective, others were very enthusiastic and felt that very strong evidence existed.

> *We have on hand written evaluations of significant people including: teachers, aides, psychologists, parents, students and staff from community agencies. (P)*

> *While we don't have objective evidence, we do have fairly strong evidence based on the opinions of a number of relevant individuals and groups. (A)*

> *Difficult to measure, but we have some evidence in some individuals. (S)*

Those respondents who were undecided felt that they did not have strong enough evidence to support this statement.

> *Not enough information. (We have some evidence, not "fairly strong"). (S)*

STATEMENT #4

> *"Community reaction to EOF (Compensatory) is favourable."*

FINDINGS:

The *majority* of the respondents agreed with the statement. (85.7%)

DISCUSSION:

Some of those in agreement felt that communication between community and school should be improved so that the community members would really understand compensatory education and also so that community opinion about school programs would be easier to gather. Others felt that the community members, and particularly the parents, gave good evidence of support for the projects.

> *Perhaps more information could be passed on at the local level. (S)*
>
> *Favourable to our programs, but do they really understand compensatory education? (P)*
>
> *There is documented evidence to show that parents view the EOF program as very favourable. (P)*

STATEMENT #5

> *"There has been an improvement in instructional skills and knowledge since EOF (Compensatory) was introduced in our district."*

FINDINGS:

The *majority* of the respondents agreed with the statement. (83.3%)

DISCUSSION:

Among those reporting that instructional skills and knowledge had improved in their districts, there was general agreement that improvement was most pronounced in skills related to diagnosing student needs. Some attributed the improvement in the instructional area to improved communication and planning.

> *With EOF (Compensatory) we find a better collaboration and communication among teachers and students, and this appears to have improved the learning situation. (B)*

> *When teachers are forced to sit down and figure out where they're going and how they're going to get there, professional growth and improved instructional skills have to result. (A)*

STATEMENT #6

> *"There is fairly strong evidence available in our district to suggest that EOF (Compensatory) has increased the student's level of mastery of reading, mathematics, and language."*

FINDINGS:

The *majority* of the respondents agreed with the statement. (82.6%)

DISCUSSION:

Of the respondents agreeing with the statement, most reported that standardized test scores showed appreciable gains in the basic skill areas of reading, math and language. Some stated that teacher observations had also provided evidence of improvement. Others reported that they felt the gains were due to the increased opportunity for individualized instruction and the remedial programs which the projects afforded.

> *Reading and language are given the emphasis with good results. In fact, in some cases this is redeeming an otherwise nearly impossible situation. (B)*

> *This is on the basis of our standardized test results, our teachers' observations, and generally the achievement in the various curriculum areas. (S)*

Respondents who were undecided reported that they were not aware of such evidence in their districts or that the nature of the particular project called for accomplishments in areas other than reading, math or language.

STATEMENT #7

> *"Our evaluation results contain a good balance of opinion data and test scores."*

FINDINGS:

The majority of the respondents agreed with the statement. (78.6%)

DISCUSSION:

Some of the respondents who agreed felt that the desirable balance between opinion and test data was determined by the nature of the project. Others believed that the Department should provide more assistance in the areas of evaluation so that school systems could carry out more valid assessments of their project's effectiveness.

> *In terms of our proposal, I agree. The term "good balance" must be viewed according to individual project objectives. (P)*

> *If we are going to do evaluations that mean anything at all, the Department is going to have to increase the resources for this. (A)*

> *If evaluations are to be comprehensive and defensible, local people can't do them. Perhaps the Department should think of selecting promising projects for intensive evaluation. (A)*

STATEMENT #8

> *"Since the inception of EOF (Compensatory) there has been an increase in professional growth of teachers."*

FINDINGS:

The *majority* of the respondents agreed with the statement. (70.8%)

DISCUSSION:

Those agreeing felt that the teachers involved in the project had shown professional growth. Some reported an improvement in teacher self-concept, and growth resulting from being involved in project planning.

> *Teachers in these programs have shown greater interest through direct involvement. (B)*

> *It has improved teacher self-concepts and as a result, improved teacher instruction. (A)*

Those who were undecided felt that it was difficult to attribute an increase in professional growth to EOF alone.

> *There seems to be growth, but if EOF is the sole reason is not known. (B)*

STATEMENT #9

> *"There has been an improvement in staff morale since the inception of compensatory education in 1973."*

FINDINGS:

The *majority* of the respondents agreed with the statement. (65.2%)

DISCUSSION:

Of those respondents reporting improvements in staff morale, some felt that this improvement was a direct result of teachers having the opportunity to give the students who needed extra help the attention they required. This tended to decrease teacher frustration and provide encouragement.

Some respondents felt that a lift in morale among participating teachers spread to those not directly involved in the project.

> *Children who had formerly caused teacher frustration are receiving help. (P)*
>
> *Increased student level of achievement brings encouragement to the teaching staff. (P)*
>
> *Here again, our participating teachers are encouraged and enthusiastic. The gain is passed on to the non-program teachers. (P)*

Some of the respondents who were undecided felt that the direction of change in staff morale depended on which aspect of the project the teachers were affected by. For instance, one respondent reported that the special education work load had decreased, but testing, etc., had increased teacher work load. Others felt that it was hard to attribute a change in staff morale to any one single factor.

> *There has been a change in staff morale. It's a "hot-cold" situation. (S)*
>
> *There are many, many other things that contribute to staff morale besides the compensatory component, so it's hard to single this out . . . (A)*

STATEMENT #10

> *"There has been a noticeable increase in the interest which parents have taken in their children's education since EOF (Compensatory) was introduced in our district."*

FINDINGS:

The *majority* of the respondents were undecided about the statement. (58.3%)

DISCUSSION:

Those who were undecided indicated that they found it difficult to respond to the statement, either because they were not working directly in the projects, or because they had not yet heard the reactions of the parents.

> *Difficult to comment on when not working directly in the projects. (B)*
>
> *I accept the possibility but I haven't been able to measure it. (P)*

Of those respondents who agreed with the statement, some felt that changes had taken place more in terms of parents' attitudes than behaviour. Others felt that the projects had increased parental awareness of existing learning problems, and of the school's attempts to help the children.

> *The improvement is noticed more in terms of attitude than actual behaviour. There have been fewer complaints, for example, since compensatory came in. (P)*
>
> *Parents were made aware of the learning problems which do exist in the classroom. (B)*

SUMMARY

1. *"Compensatory education has enabled districts to use new and unique ways of teaching the skill subjects of reading and mathematics." (100.0% agree)*

Home and community involvement projects, small group instruction, and individualization have been used. The opportunity to use new methods was a very desirable outcome of compensatory funding.

2. *"There is fairly strong evidence to suggest that EOF (Compensatory) has improved student attitudes and motivation." (100.0% agree)*

Evidence comes from objective evaluations of projects as well as subjective reports of parents and teachers.

3. *"There is fairly strong evidence to suggest that EOF (Compensatory) has increased the level of self-confidence and self-respect of 'disadvantaged' students." (87.0% agree)*

This evidence has come from reports of teachers, parents, aides and others significant in the lives of the students. Although this evidence is largely subjective, it was felt by the project personnel to be strong enough to be an encouraging result of the program.

4. *"Community reaction to EOF (Compensatory) is favourable." (85.7% agree)*

In many areas community members, and particularly parents, gave good evidence of support for projects. In other communities, communication between communities and schools should be improved so that the community members would really understand compensatory education.

5. *"There have been improvements in instructional skills and knowledge since EOF (Compensatory) was introduced . . ." (83.3% agree)*

Improvement was most pronounced in skills related to diagnosing student needs. The improvement in the instructional area may be due partly to improved planning and communication.

6. *"There is fairly strong evidence to suggest that EOF (Compensatory) has increased the student level of mastery of reading, mathematics, and language." (86.6% agree)*

Appreciable gains were produced in the basic skill areas of reading, mathematics and language. Teacher observations also provided evidence to support the statement. The gains may have been partly due to the increased opportunity for individualized instruction and the remedial programs which the projects afforded.

7. *"Our project evaluation results contain a good balance of opinion data and test scores." (78.6% agree)*

A "good balance" depends on the nature of the project. The Department should increase the resources for the evaluation component so that school systems can carry out more thorough and technically adequate evaluations of their projects' effectiveness.

8. *"Since the inception of EOF (Compensatory) there has been an increase in professional growth of teachers." (70.8% agree)*

Some teachers involved in the projects have shown greater interest through direct involvement, and have improved their instructional competencies Involvement in project planning may be a factor contributing to professional growth.

9. *"There has been an improvement in staff morale since the inception of compensatory education in 1973." (65.2% agree)*

The improvement noted might be a result of teachers having the the opportunity to give the students who need extra help the attention they require. Children who had formerly caused teacher frustration received help, and increased student level of achievement brought encouragement to the teaching staff.

10. *"It is possible that there has been an increase in the interest which parents have taken in their children's education since EOF (Compensatory) was introduced. (58.3% undecided).*

However, the reaction of parents has not yet been measured and therefore no strong support for the statement was found.

C. A Summary of Comments and Recommendations made by Personnel in Participating Districts.

At the end of each questionnaire, respondents were invited to offer additional comments and suggestions for improving EOF (Compensatory) in Alberta. Typical responses are presented here to acquaint the reader with the general feeling of superintendents, deputy and assistant superintendents, project supervisors and school board members in participating districts.

The predominant feeling is that the EOF (Compensatory) program is good, but that there is room for improvement. For the reader's convenience, responses were divided into three categories: positive comments, negative comments,and suggestions for improvement.

POSITIVE COMMENTS About EOF (Compensatory)

Positive comments were often made about the effect EOF (Compensatory) had on the district. An excellent representative comment of this nature is recorded below.

> *The EOF (Compensatory) almost doubled the money made available at a student level and so had the following dynamic effects:*
>
> 1. *Dramatic improvement of disadvantaged.*
> 2. *Definitely improved the target population's self-image, sense of achievement and love of learning.*
> 3. *Established a reading and oral speech bias among teachers.*
> 4. *Resulted in a systematic inservice training program for all Grade 1 to 3 teachers and selected 4 to 6 teachers.*
> 5. *Caused principals to do more educational leadership duties such as teacher-tutor-parent-principal meetings over cases, advisory duties re: materials complementary to existing materials.*

6. *Forced superintendent to show some initiative and program leadership, resulting in revised policy handbook and regulations. More specific guidelines and establishment of priorities for money expenditure.*

7. *Forced the central office management to accept P.A.B. accounting tied to programs (functions).*

8. *Created a School Committee for awareness of/ interest in curriculum meeting the needs of students.*

9. *Obtained more manpower support for the superintendent. We now have an assistant (partially funded by EOF (Elementary)) who functions as a program director improving the coordination of the program.*

Other comments were very positive and expressed a desire to have the EOF (Compensatory) program continue. For example:

1. *Compensatory funding must continue next year. It is a winning team and we do not want to change it.*

2. *EOF (Compensatory) has produced positive effects in our district, there's no question on that!*

3. *EOF (Compensatory) is helping to meet real needs in our area. I hope this funding will be continued.*

4. *We are wildly enthusiastic about EOF.*

NEGATIVE COMMENTS About EOF (Compensatory)

The following is a list of comments which appeared to fall into the negative classification. To facilitate the accuracy of presentation, the comments are listed verbatim below. For the most part, they speak for themselves.

1. *One year funding is not adequate.*

2. *Guidelines were not clearly defined, criteria were not specifically outlined. The process for submitting proposals to the Department was ponderous and bureaucratic. The implication that some people, remote from the local scene, are more suitable to judge the needs than those on the scene was inherent in the establishment of this great structure.*

3. *Compensatory education implies that the kids are defective and not the program.*

4. *Right away a comparison is made between people: the whites are better than the Indians culturally; the city people are better than the rural people socially. The large urban areas with huge tax revenue are better than the rural areas environmentally.*

   On the other hand, through media, these (supposedly) disadvantaged people hear about pollution, the concrete jungle, the ruin of nature and crime in urban areas. Rural people are disadvantaged?

5. *Education is successful to the extent that it meets the needs, goals and ambitions of the local people. These are the reasons why native people are asking for more local control, to make education fit their cultural, social and environmental needs, goals and ambitions. Education would then mean something, be of value and be desired. This applies in the same way to white families in isolated communities.*

6. *High schools may draw students from all over the city and not always from one concentrated pocket of deprivation. The school may be in a 'good' area, but have students who need help, who come from another area in the city or rural area nearby.* (This comment pertains to school attendance area eligibility).

7. *I dislike the term 'disadvantaged' from the point of view of a front-line worker who must communicate with rural families who do not wish to be looked upon as economically, culturally or socially 'disadvantaged.' For example, although the objectives of EOF (Compensatory) look fine on paper, they cannot be communicated as such to the community of families involved. Furthermore, I felt extremely uncomfortable documenting economic and environmental deprivation on the basis of socio-economic factors - there must be a more sensitive way of meeting needs than this!*

SUGGESTIONS for Improving EOF (Compensatory)

The following is a list of suggestions for improvement, as compiled from questionnaires returned by mail and from telephone interviews.

1. *There should be more communication between similar projects.*

2. *There should be less paper work required.*

3. *Regional Office personnel should come out and "evaluate" projects.*

4. *Teachers who work in compensatory should be of high calibre and have a genuine interest in disadvantaged students.*

5. *Pupil performance in the regular school program should be a major criteria for selecting target groups.*

6. *Faster decision making during the proposal approval stage is a must.*

7. *More leadership in the form of inservice training, and conferences related to project planning and evaluation should be undertaken by the Department.*

8. *The whole idea of compensatory education should be to innovate and develop new ways and means of attacking educational problems.*

9. *The Department of Education needs to spend a year on 'conceptualization' of a plan and pilot the plan to iron out wrinkles. EOF (Compensatory) was a rush-up job which complicated acceptance of proposals.*

10. *If Compensatory continues, local districts should have the opportunity to continue current projects if the need exists.*

11. *Project plans need to be guaranteed for 5 years to lend stability.*

12. *Expand the funds available.*

13. *Financial means of the school system should be the major criteria of eligibility for opportunity funds.*

14. *Funds should be "ear-marked" for specific purposes.*

15. *Program planning, administration, and evaluation should be included in the funding formula.*

16. *A school board's contribution should be proportional to the financial means of the school system and the extent of the special needs identified in relation to the board's ability to adequately meet these needs for the identified target groups.*

17. Provide 'front-end' money for planning and writing proposals.

18. The equalized assessment per pupil parameter represents a good base line, but there is no doubt that there are pockets of disadvantaged students in areas having equalized assessment per pupil figures higher than $4,000. which are being missed. As a base line, it is pretty good but in itself it is not good enough. There needs to be further inspection to delineate further the needs of the problems of a district.

19. The funding should continue. Compensatory should have been implemented long ago.

20. EOF (Compensatory) and Elementary should be put into one fund. This would make accounting and auditing easier. The single fund could be used at the Division level, at the discretion of the superintendent, to carry out projects and programs as proposed.

21. It appears that the competitive nature of EOF (Compensatory) will perpetuate continued inequality of educational opportunity in rural Alberta due to the lack of manpower required to compete. I find this very distressing. The Department should take into consideration what is reasonable (and humanly possible) for people in the field to accomplish in terms of proposal writing and evaluation.

SECTION IX

PROGRAM RESULTS

A Report of Data Based on Project Evaluation Reports

This section presents a summary of findings based on project evaluation reports submitted to the Department of Education by local school districts. Project evaluation reports were available from twenty-eight of the forty-five projects by July 31, 1976 when the review of reports began. This number represented more than seventy-five per cent of the funds appropriated for compensatory education. Included in the group reviewed were the three major funded rural jurisdictions (High Prairie School Division #48, Northland School Division #61 and Ft. Vermilion School Division #52) and the two largest urban centres (Edmonton Public School District #7 and Calgary Public School District #19).

The findings presented in this section are based on the results reported by project evaluators. The results presented in reports were sorted into categories according to the type of data supporting them. Two major categories were used: (1) results based on test data and, (2) results based on opinion data. Each of these major categories were further sub-divided. The first one, test data, was divided into cognitive measures and attitude measures, and the second one into opinions reported by students, parents, teachers, and others. The source of the data was not disclosed to protect the anonymity of project staffs and evaluators. Due to the large volume of information available, only a few representative comments could be reproduced here to convey to the reader the general trends evident in the reports reviewed.

1. Results Based On Test Data.

(a) Cognitive Measures.

Projects designed to improve performance in the basic skills areas of reading, language and mathematics were generally found by project evaluators to be producing positive gains.

> *In the most significant and emphasized aspect of the evaluation, objective performance changes, most students showed dramatic gains in all language arts and reading areas examined.*

> *Analysis of program students group data indicated that there were statistically and educationally significant gains made in the areas of oral language comprehension, reading, phonics, and auditory and visual memory.*

Grade four and five Distar Language students exceeded their expected gains by significant amounts.

Considering the total vocabulary scores, the mean gain for all grade 3-6 students was .57 G.E./year; the expected gain was .58 G.E./year.

Considering the total reading scores, the mean gain for all grade 3-6 students exceeded the expected gain.

All of the grade 1 and 2 compensatory education students, for which data were available, exceeded the norm for all four basic skills areas tested.

There has been growth in each of the categories that were tested. There is a full year's growth in vocabulary and language usage and a five months growth in reading.

Tests were administered eight months apart. Compared to the normal growth of these students which was ≈ .48 per year, significant growth can be seen in each of the areas that were tested.

Though the target population's scores expressed in grade equivalents are not exceedingly high, when calculated as a "rate of progress" for a school year, indicate substantial progress over previous non-project years.

The percentage of 6th year students achieving below their grade level in reading has decreased from 59% to 35% as measured by the Gates-MacGinitie Test.

The percentage of 5th year students achieving below their grade level in reading has slightly decreased from 47% to 42% as measured by Gates-MacGinitie Test.

The percentage of 4th year students achieving below their grade level in reading has decreased from 71% to 34% as measured by Gates-MacGinitie Test.

The percentage of 3rd year students achieving one year or more below their grade level has decreased from 72% to 16% as measured by the Sucher-Allred Word Recognition Test.

The percentage of 2nd year students achieving one year or more below their grade level has decreased from 64% to 10% as measured by the Sucher-Allred Word Recognition Test.

Reading comprehension for 5th year on C.T.B.S. is slightly lower than scores obtained in 1974.

Spelling for 5th year on C.T.B.S. has shown a growth of 4 months as compared to scores obtained in 1974.

> *Capitalization for 5th year on C.T.B.S. has shown a growth of 6 months as compared to scores obtained in 1974.*
>
> *Punctuation for 5th year on C.T.B.S. has shown a growth of 3 months as compared to scores obtained in 1974.*
>
> *Word usage for 5th year on C.T.B.S. has shown a growth of 2 months as compared to scores obtained in 1974.*

(b) Attitude Measures.

Project evaluators reported no appreciable improvement in student attitudes based on the measures used, eg. Coopersmith Self-Esteem Inventory, Colorado Reading Attitude Inventory, Smile Test, I.P.I. Mathematics Attitude Questionnaire (Part C).

Project evaluators generally qualified their results by stating that attitude change takes time and that in the space of a few short months between pre-tests and post-tests, gains might not be great enough to be detected by currently available insensitive instruments.

> *There were no significant differences between the program and control students on the personality and attitude measures during pretests. However, control students reported significantly better attitudes toward school on the post-tests. There were no other significant post-test differences.*
>
> *No statistically significant differences were found between compensatory education and comparison group students for the variables self-concept, attitude towards fellow students, attitudes towards school (grades 3-6), and attitudes towards mathematics.*

While generally no discernible improvement was noted in attitudes, based on the measures used, there were some exceptions.

> *Statistically significant differences favoring grade 1 and 2 compensatory education students were found for the variable attitude towards school.*
>
> *Marginal statistically significant differences favoring compensatory education students were found for the variable attitude towards reading.*

2. Results Based On Opinions.

(a) Opinions Expressed By Students

Project evaluators surveying student opinion found that generally students were pleased with the extra help provided. The following set of comments, by students, presented in one evaluation report speak for themselves.

> *It (reading) became easier to do.*
>
> *I never read over four books last year.*
>
> *I never used to get interested in books and now I do.*
>
> *Because I know what I'm reading for . . .*
>
> *Now, with more selection, I sometimes read for a long time at night.*
>
> *A year ago I wasn't reading much, but now I like to read a lot. I wish this program had this influence on all the students.*
>
> *Keep the interesting books coming in.*

(b) Opinions Expressed By Parents.

Project evaluators generally reported that parents felt the program helped their children and favored its continuation.

> *Parents report they are happy with the class effect on their children. They are generally pleased to see their children so happy.*
>
> *Parents have become less reluctant to send their children to school.*
>
> *For the most part, a majority of the parents reported that their children had improved to some or a great extent this year as compared to last in all areas questioned.*
>
> *Reported improved oral language skills, attitudes towards school in general and improved reading skills as being the areas in which their children had made greatest gains.*
>
> *Of those providing additional comments, the majority felt that their child had shown marked improvement under the compensatory project. Some wished to have the project continued and extended to include children in other grades.*
>
> *Our conclusion is that the parents are strongly in favour of continuing this program. We also noted in the questionnaires an inability on the parents' part to separate the benefits their child was receiving from the regular Language Arts classes, from the Reading Lab and from the Remedial Reading teacher. This pleases us, as it is evidence of the coordination and integration of all the reading approaches of the school.*
>
> *All parents feel that the program has been worthwhile.*
>
> *Eleven responses stated that the most important aspect of the program was an improved understanding of the English language*

> *and word meanings.*
>
> *All parents felt that the program should be continued.*
>
> *Two children in the program are no longer residing in the district, but their parents have made arrangements for them to continue attending school.*
>
> *Most (95%) of the parents surveyed felt that their child enjoyed attending the Resource Room, that it was helping them and that a change in their child was evident.*
>
> *67/132 parents said they had noticed a change in their child's attitude toward reading.*
>
> *83/132 parents indicated that their children read more now than they did a year ago.*

The following opinions, expressed by parents, are typical of the type of responses generally received by project evaluators.

> *A year ago he only read what he had to read in school. Now he is reading because he wants to, and is reading at home.*
>
> *Our son is now enjoying reading by himself.*
>
> *They are reading much more, and actually enjoying it!*
>
> *He enjoys it very much and is much more interested in books.*
>
> *She is more interested in reading on her own.*
>
> *. . . eager to read a lot more at home, newspapers, especially, and what's going on.*

(c) Opinions Expressed By Teachers.

Generally, project evaluators found that teachers favored the program. The majority of teachers reported that it was really benefitting students.

> *This is one of the better programs that the government has funded. I sincerely hope that it continues.*
>
> *A project like this is extremely valuable, to acquire resource materials and equipment which otherwise the pupils would greatly miss.*
>
> *The EOF project has provided some stimulating learning experiences out of the "classroom," which are quite beneficial to most students.*

> *This teacher has observed that native students who have attended compensatory classes seem more confident than those who have not. They move about the school with ease, do not hesitate to defend their own space to other students, speak to most teachers openly and generally negotiate the daily business of the school competently.*
>
> *Teachers in all the major subject areas - Mathematics, Science, Social Studies, and Language Arts have observed an improvement in students' ability to cope with work in the regular classroom.*

(d) Opinions Expressed By Others.

A comment made by a librarian shows an indirect outcome of the EOF (Compensatory) program:

Library use -

> *In comparing circulation figures for this school year and previous years, a marked increase in the number of books borrowed is evident. The increase is most noticeable in the area of recreational reading. The students are very enthusiastic about the arrival of new books, especially paperbacks, and are always eager to see "what's new" on the shelves. Not only have more students been borrowing more books, but they have also shown a greater interest in the selection of books and periodicals for the library. Many good suggestions have been forth coming from students of all ages.*

SUMMARY

Data presented in local project evaluation reports, based on cognitive and attitude measures, reveal that EOF (Compensatory) --

1. improved the performance of target children in the basic skills areas of reading, language and mathematics,
2. provided no appreciable improvement in student attitudes.
3. . . . It also appears that EOF (Compensatory) has strong support from the various groups surveyed: (a) students have reported developing interests in reading which were non-existent prior to the program. (b) parents report that their children are happier, that they have improved attitudes toward school, that they take a greater interest in matters relating to school work and that generally school performance has improved. Parents would like to see the program continued. (c) teachers are pleased with the opportunity to use new materials which provide more stimulating learning experiences for their students and are pleased that their efforts are being rewarded with improved student performance.